

INSO
INTERNATIONAL NGO SAFETY ORGANISATION
Analysis & Advice for Humanitarians

Strategic Review

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ACRONYMS

ACBAR	Afghan Coordinating Body for Aid and Relief
ANSO	Afghanistan NGO Safety Office
CD	Country Director
CRASH	Centre de Réflexion sur l'Action et les Savoirs Humanitaires (MSF)
DD	Deputy Director (INSO)
DFID	Department for International Development (UK)
DO	Designated Official
DSA	Deputy Safety Advisor
EISF	European Interagency Security Forum
FM	Field Monitor
GANSO	Gaza NGO Safety Office
GPPI	Global Public Policy Institute
HAWG	Humanitarian Access Working Group
IASC	Inter-Agency Standing Committee
ICRC	International Committee of the Red Cross
INSO	International NGO Safety Organisation
IRC	International Rescue Committee
ISAO	International NGO Safety Advisory Office (Yemen)
LCB	Lake Chad Basin (encompassing NE Nigeria, Niger and Cameroon)
LNGO	Local NGO
LWF	Lutheran World Federation
MEL	Monitoring, Evaluation and Learning
MSF	Médecins Sans Frontières
NGO	Non-governmental organisation
NRC	Norwegian Refugee Council
NSP	NGO Security and Preparedness (Somalia)
OCHA	UN Office for the Coordination of Humanitarian Affairs
PUI	Première Urgence Internationale
SA	Safety Advisor
SD	Section Director (now Regional Directors) INSO
SDC	Swiss Agency for Development and Cooperation
SLT	Saving Lives Together
SPAS	Security Preparedness and Support (Somalia)
SSCL	Safety and Security Committee for Lebanon
UNDSS	United Nations Department for Safety and Security
UNHAS	United Nations Humanitarian Air Service
UN OCHA	United Nations Office for the Coordination of Humanitarian Affairs



Denotes field notes and **quotations** taken by the researcher during the review

As an independent study, unless otherwise stated the opinions and views expressed in this review reflect those of the author only and should not be taken as expressing the opinion and views of INSO or its employees.

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1 EXECUTIVE SUMMARY

This report presents findings from a strategic review of the International NGO Safety Organisation (INSO) conducted over three months between February and May 2019. It draws upon extensive interviews during visits to six of INSO's field platforms, and to its Operational Support Office (OSO) in Dubai. It has been further informed by a detailed review of internal and external documentation.

The Terms of Reference for the review, included in Annex 3, stipulated three related lines of enquiry: an examination of INSO's structural impacts and its effects on the global humanitarian safety coordination architecture; identification and illustration of INSO's operational impacts on NGO practices, programmes and policies, and; the identification of options for systematically monitoring INSO's impacts.

Consistent with its original intent and stated objectives, INSO's primary role thus far has been as a provider of a highly specialised common service available to members and partners. INSO's impacts are reflected in more conducive operational environments and safer ways of working that enable -- and contribute to the resilience of -- principled, timely, effective, and cost-effective humanitarian responses.

INSO has moved NGO safety coordination platforms substantially forward in ways that are consistent with the findings and recommendations contained in UN OCHA's "To Stay and Deliver!" and "Presence and Proximity?" documents. INSO provides its members with high-quality context and stakeholder analysis and equips them through an extensive training programme, bespoke area briefs, advisory services and other means to improve their use of evidence in risk analysis such that safety and access related decisions are improved. By providing its products and services to members free of charge, INSO has helped level the risk-management playing field between INGOs and LNGOs. Fully 38% of INSO members are LNGOs: that number is increasing relative to INGOs. LNGOs now have unprecedented access to state-of-the-art safety products and services from INSO platforms, enhancing their abilities to manage risk in keeping with Grand Bargain Commitments to Localisation.

INSO's role is multi-faceted and solves a wide variety of problems on behalf of operational INGO / NGO actors, or it provides the space, opportunity and specialist expertise that help to create the conditions under which such problem-solving successfully occurs. While the bulk of INSO's efforts aim to facilitate the humanitarian work of its membership in improved safety, INSO products and services yield substantial benefits for humanitarian responses more broadly, including through its secondary role as a facilitator

of safety coordination. INSO platforms have provided INSO beneficiaries and others with important opportunities for greater coordination. These opportunities represent a marked improvement over ad hoc approaches to safety coordination that have existed in the past, and have been acted upon with good effect through INSO's facilitation of joint action, improved incident reporting, information sharing and analysis; common, high-quality datasets, and; higher standards and wider availability of context-specific training.

At a structural level of impact, INSO has created a standardised system for deploying NGO safety platforms to a wide variety of diverse conflict contexts. Since the inception of INSO in 2011, no other NGO safety platforms have emerged with one relatively short-lived exception in Lebanon: all other new platforms have been created by INSO. INSO's independent organisational structure has streamlined the process of deploying safety platforms and getting them up and running quickly and effectively. The quality and consistency of INSO products and services, as well as INSO's adherence to humanitarian principles, have contributed to its rapid growth and enabled INSO's acceptance by the humanitarian community in new contexts. INSO has improved perceptions of NGO safety platforms to the extent that INSO is now regarded as an essential component of humanitarian responses in difficult contexts, and with growing authority. INSO is an active participant in the Saving Lives Together (SLT) Framework and is normally requested by its membership to represent member interests to the SLT.

INSO's global products are growing in number and importance. When INSO's Conflict and Humanitarian Data Centre (CHDC) becomes fully operational it is expected to enable significant advances in INSO's analytical, mapping and data products. The CHDC will be available for use to INSO members and select others, as well as to INSO platforms worldwide. The tool will be a major step toward fulfilling recommendations in "Presence and Proximity" regarding the sound evidence base needed for guiding safety policy and practice.

The review documents a representative sampling of INSO's impacts, placing a premium on the narratives of humanitarian workers who use INSO's products and services in their day-to-day field operations and overtime. Evidence from the field illustrates how INSO achieves its impacts along several vectors of change and influence: as provider of a common service, as author and editor of a common, independent and humanitarian-focused safety narrative, as a buffer and common front, as the institutional memory and field-level authority for context and safety, as technical resource and skills provider, and as the repository and channel for extensive primary safety incident data.

¹ Egeland, J, Harmer, A and Stoddard, A (2011)

² Jackson, A and Zyck, S (2016)

Field narratives have been suggestive of patterns in the ways that INSO products and services have made a difference to humanitarian responses. There is considerable overlap between INSO's structural and operational impacts. Cumulative operational impacts sometimes result in, or contribute to, important structural 'stay and deliver' impacts. As the humanitarian apparatus continues to struggle to adapt to safety challenges in many contexts, INSO facilitates this adaptation by helping to professionalise safety management, encourage evidence-based responses, and disrupt maladaptive reactions to shocks and downturns in the security environment. This hinges on INSO's role as a mechanism by which NGO security postures are calibrated more accurately to verified risks. In this role, the impact of INSO is that it enables NGOs to stay and deliver with greater presence and proximity such that aid is more effectively provided commensurate with need in reasonable safety and at bearable cost.

INSO can optimise its impacts in several ways. INSO platform staff typically have a strong intuitive grasp of how their interventions can and do make a difference in the day-to-day work for their NGO beneficiaries. However, INSO needs to consider putting monitoring, evaluation and learning (MEL) systems in place for capturing, preserving, learning from and sharing those impacts. Several options are identified for enabling INSO to do so.

Improved monitoring, evaluation and learning that draws upon a better understanding of impacts will also position INSO to have greater influence on the formulation of humanitarian safety policy, and on the humanitarian community of practice, particularly when used in concert with the CHDC. INSO has laid a sufficiently strong and authoritative foundation such that it can and should now turn more of its attention outwards to deficiencies in humanitarian safety architecture, policies and practices that span humanitarian responses in conflict areas worldwide, and that are often felt acutely at field level. Improved MEL and the CHDC show considerable promise for illuminating incident causality in potentially ground-breaking ways.

The impact of INSO is that it enables NGOs to stay and deliver with greater presence and proximity such that aid is more effectively provided.

2 INTRODUCTION

This strategic review occurs some eight years after INSO's inception

and four years after a previous review. Building on the previous review, the report documents INSO's role in humanitarian responses by identifying and exploring its impacts at field level and at the structural level of safety coordination architecture.

INSO is an international NGO that operates ten country platforms and two monitoring missions in conflict areas. Its mission is to support the humanitarian community with information, analysis and advice that enhances situational awareness, supports informed decision-making, strengthens operational practices and enables humanitarian access. INSO is funded by donors to provide a range of cost-free functions for members including a 24/7 threat warning service, regular roundtable and country director safety coordination meetings, crisis assistance and support, site security and safety policy reviews, and on-demand movement and area risk assessments. INSO provides a range of analysis, mapping and statistical products to identify trends in threats to aid agency staff, assets and operations, and generates primary-source analytical reports to support context awareness. It has a large orientation and training element to mitigate and minimise risks and to assist members in meeting their security management responsibilities. Global products for members, the quality, relevance and reach of which are guided by an International Advisory Board, include an online aggregated data and analysis platform, World Alert incident reporting, quarterly Safety and Access Reviews and a monthly Key Data Analysis report.

INSO opens new platforms in response to demand. Full platforms now include, in order of their inception, Afghanistan, Democratic Republic of Congo (DRC), Mali (also covering Burkina Faso), Syria, Central African Republic (CAR), Iraq, Somalia, Nigeria and South Sudan. The Nigeria platform (covering the northeast states) is also referred to as the Lake Chad Basin (LCB) platform and is expected to become more operational in Niger and Cameroon in the coming year. Due to a combination of contextual indicators and NGO needs, two scaled-down monitoring missions offering a limited range of products and services operate in Kenya (referred to as the Horn of Africa platform) and Ukraine.

INSO subscribes to humanitarian principles and is a signatory to the Code of Conduct of the International Red Cross and Red Crescent. It is funded exclusively by donors. Its direct beneficiaries are its partners, comprised of approximately 935 organisations of which some 95% are NGOs. Of these, approximately 57% are INGOs and 38% national or local NGOs. The remaining partners include UN agencies, ICRC, IFRC and National Societies and some donors. Full registration for membership in INSO is restricted to international and local NGOs. All partners are required to abide by INSO's code of conduct which obligates them to share safety-related information with INSO to the extent possible in a timely

manner. Strict confidentiality is also a requirement of INSO platforms, partners and members alike.

Although INSO emerged out of the experience of the Afghanistan NGO Safety Office (ANSO), which began in 2002, INSO itself was constituted as a UK-based charity in 2011 on its founder's belief in the more generalised utility of such platforms. INSO has grown quickly since then, developing a suite of standardised products and services that can be deployed rapidly when a new INSO platform is requested. In recent years it has also rolled out several global products and is field-testing its Conflict and Humanitarian Data Centre (CHDC), a proprietary central incident database linked to an advanced data and mapping application. In early 2019, INSO relocated its charitable registration to The Netherlands.

INSO's products and services make incremental contributions to humanitarian safety and access that have downstream structural impacts upon humanitarian effectiveness and humanitarian access. Although it is notoriously difficult to isolate impacts on situations that are, by their nature, exceedingly complex and subject to many different variables, a better understanding of its ongoing impacts will inform INSO's ability to assess the quality and relevance of its products and services, and to adjust its approach where necessary. An improved ability to demonstrate its impacts will help to establish INSO as a topical authority. It will also help to explain how INSO solves problems and will engender better understanding of INSO among prospective members, donors and policy makers, demonstrating how they can benefit from INSO's experience.

This introductory section continues with a description of the methodology for the review, and its limitations. A brief history of INSO's emergence and evolution describes how INSO was conceived and why, unpacking some of the choices made that have shaped INSO into what it is today.

Part I examines the structural impacts that INSO has had on safety coordination at the global level. It parses the organisational features of INSO that have contributed to rapid growth and strong uptake of new platforms. This is followed by a survey of the safety management context within which INSO operates, with specific reference to the findings of "Stay and Deliver", "Presence and Proximity" and more recently to the Grand Bargain commitments. The section then turns to INSO's role as a mechanism for enabling accurate calibration of safety postures to verified risks: that is, the contributions INSO makes to the ability of the humanitarian apparatus to 'stay and deliver' when faced with shocks, spikes in incidents or gradual declines in safety. A heuristic is proposed to aid in identifying, clarifying and tracking these impacts.

Part II documents evidence from field visits that illustrate the scale and scope of INSO's operational impacts on aid operations, noting the considerable crossover over time between operational

and structural impacts. It highlights several of the roles INSO plays at the operational level: repository and channel for safety data; provider of a common service; author and editor of a common, independent and humanitarian focused safety narrative; buffer and common front; topical authority, and; technical resource and skills developer. The section posits increased vulnerabilities and strengthened capacities as a simple but nonetheless useful point of departure for isolating indicators of impact.

Part III assesses INSO's impacts and explores aspects of INSO's capacities, vulnerabilities and positioning with a view to illuminating possibilities for optimising its impacts. Following an examination of INSO's contextual and structural positions, it then looks at INSO's organisational culture and its people, suggesting ways that adjustments will enable greater impact. The upcoming CHDC is then explored in view of its likely implications for greater structural impacts. Additional factors both internal and external to INSO are explored that affect INSO's ability to bring about change, including enduring constraints on the willingness of the humanitarian community to share safety-related information, the regulatory environment of humanitarian professionalism and the subjective character of safety and access.

Part IV identifies several options for monitoring, evaluation and learning that will enable INSO to capture its impacts in a systematic way. Some of these were developed in detail and were provided to INSO separately as part of this review. The section concludes with a discussion of whether and how INSO should formalise the monitoring, evaluation and learning (MEL) function, and the pros and cons of a dedicated MEL cell vs. mainstreaming it throughout the organisation.

Part V distils the dominant themes that have emerged during the review, urging a re-think of how INSO perceives its role and how its role is perceived. It recapitulates options for INSO to build on its successes and strengths to date so that it becomes positioned to wield greater influence on policy and practice gaps that impair aid worker safety and effective humanitarian responses at field level, highlighting in particular the need for closer analysis of incident causality, enabled by strong MEL and the CHDC.

For reference, a description of INSO platforms, products and services is included in Annex 2.

2.1 Methodology, conduct and limitations of the review

Visits of varying lengths were made to six of INSO's platforms over eight weeks. Each visit combined familiarisation with the INSO platform with attendance at various meetings at INSO (or of interest to INSO) and one-on-one interviews with INSO staff, its members, non-members, other partners such as the ICRC and UN agencies, UNDSS, NGO fora and donor representatives. In each platform, an effort was made to speak with members of the local INSO advisory board and with non-members. As part of the review, 136 interviews were conducted before, during and after the field visits, almost entirely in person. Three small focus groups were

held in Amman for the Syria platform for INGO country directors, safety advisors and analysts respectively. Other interviews were conducted over Skype or phone, and 2 by e-mail Q and A. Fourteen persons opted to contribute anonymously. Interviews were generally open-ended or, in the case of donor representatives, semi-structured. Comments were noted on a not-for-attribution basis unless specific permission to do so was asked and obtained. Throughout this report the reader will find italicised quotes from those interviewed. These narratives appear as told but with editing, where necessary, for clarity or to preserve the anonymity of people and organisations when that was asked or judged necessary.

The first and longest platform visit was to Afghanistan, which showed an INSO office at its most developed, experienced and embedded in the humanitarian apparatus. The two-week visit included exposure to the Jalalabad and Herat field offices as well as the central office in Kabul. INSO Roundtables were attended at Herat (38 persons) and Jalalabad (25 persons) as well as a Country Director's meeting hosted by INSO in Kabul (~10 persons). A three-day INSO Safety Advisor / Deputy Safety Advisor Conference was also observed. It included all Afghanistan SAs, DSAs and the platform management team.

A one-week visit to Hargeisa in Somaliland included observation of an INSO Roundtable attended by 10 INSO members. This was followed by one week with INSO's newest platform in Juba, South Sudan. It included attendance at a biweekly South Sudan NGO Forum security meeting. One week was spent in Abuja and Maiduguri in Nigeria and included observation of a meeting of the Nigeria INGO Forum. This was followed by three days in Amman with the Syria platform, and two days in Erbil in northern Iraq. INSO's Operational Support Office in Dubai was visited before and at the conclusion of the platform visits.

2.1.1 Methodological considerations

Several related issues have arisen in the effort to isolate INSO's impacts and identify meaningful indicators. These have shaped the way the review has been conducted and its results. The issues have implications across the board for the design of MEL tools and the conduct of MEL itself, so they are described here at some length to inform future MEL practice.

2.1.1.1 Defining impact

For this review, the identification of impacts and their indicators occurs in light of the adaptations and maladaptations of humanitarian actors to insecure environments that have been surveyed in "To Stay and Deliver: Good Practice for Humanitarians in Complex Security Environments" and its follow-up study, "Presence and Proximity: To Stay and Deliver, Five Years On". These documents, together with Grand Bargain Commitments on localisation and aid worker safety, provide a useful point of departure for asking "What difference has INSO made?"

2.1.1.2 Operational and structural impacts

Operational impacts of INSO products and services are often evident in real-time as partners incorporate INSO advice or information into their in-the-moment, go / no-go decisions on movement, programming and crisis response. Other impacts of INSO's interventions are indirectly achieved: they come about through the decisions and actions of many organisations that are influenced by INSO, and not always as a direct result of INSO itself. There are many operational exceptions to this, but more widespread and cumulative impacts on safety and access – the broader structural or 'stay and deliver' impacts – tend to be organic products of multiple or sustained INSO interventions with many partners over time, sometimes through collaboration, dialogue with others and collective problem-solving. These are more difficult to capture and attribute to INSO or to any single INSO intervention. Likewise, INSO's growing role in difficult contexts has influenced the structural underpinnings of the humanitarian apparatus at large, replacing ad hoc and one-off safety coordination platforms with a standardised response system. In sum, INSO has different forms of impacts. The required effort and means to reveal them are different from one to the other.

2.1.1.3 Behavioural change over time

Many of these impacts are dependent on behavioural change at three levels: 1) the behaviour of individual aid workers who, for example, have read an INSO report or attended an INSO field safety training; 2) INSO-inspired changes in organisational cultures and behaviour, reflected in changed policies and practices within organisations, and; 3) institutional changes that come about as a result of collective behavioural change among organisations. Behavioural changes can take time and ongoing effort and take even longer to become enculturated and institutionalised. They are not likely to become immediately apparent from one-off, time-limited interventions that are more easily isolated. That is especially true when beliefs and behaviours around aid worker safety are deeply entrenched and have become institutionalised in policies and practices within organisations and, more broadly, throughout the humanitarian apparatus.

2.1.1.4 Intervening variables

As with humanitarian operations generally, in the volatile contexts in which INSO and its partners operate there is seldom a linear linkage between cause and effect: many intervening variables influence the security environment and humanitarian actors. For example, changes in combatant behaviour toward aid workers can dramatically alter the safety environment, as can changes to the ways that warfare is prosecuted over time. Likewise, tolerance for risk can change over time. It would be impossible to control for all intervening variables in such complex environments. Given this level of complexity, neither would it be possible to find two contexts for valid comparison, one with INSO presence and one without. As a result, challenges arise in accurately attributing less or more attacks on aid workers to greater or lesser contextual awareness, preparedness and risk mitigation measures as enabled by INSO.

2.1.1.5 Isolating 'causes'

Well-placed efforts to mitigate risk, prevent incidents and safeguard the humanitarian apparatus depend on unpacking the causes of safety problems. Likewise, if the impacts of INSO's diverse functions are to be examined with rigour, their causal chains need to be traced back through a range of different levels, from precipitating / proximate causes or triggers, through a variety of conditions and influences, to the presence of blocking causes that make attacks and the responses to them more or less likely.

An issue arises here that is implicitly addressed by much of the work INSO does: there can be a tendency, particularly after a spike in safety incidents or in the wake of a major shock, for the aid apparatus to suspend operations, scale down and / or withdraw. Presence is a necessary cause of attacks on aid workers: if they are not present, attacks will not occur. Programme suspension or withdrawal solves the immediate problem of keeping aid workers safe: if INSO's sole aim was to prevent attacks on aid workers, it would advise them to evacuate at a low threshold of risk. While it is INSO's aim to prevent attacks, that aim is effectively subsumed under the larger aim of facilitating effective humanitarian responses – enabling its partners to 'stay and deliver'. The point here is that with different levels of impact to unpack, it is necessary to follow the causal chains for all of them and to be clear about the desired end-state.

Narrative accounts of how INSO products and services have been used reveal examples of where proximate or precipitating causes, conditions and influences have been removed or shaped as a result of an INSO intervention. Operational impacts are comparatively easy to identify. The larger questions regarding impact are, "How has INSO shaped responses to insecurity such that a) preventive and mitigating measures are taken on board by members to prevent an under-reaction to the threat environment?", and, "How has INSO influenced reactions to ensure that responses are calibrated to risks so that effective humanitarian action can continue?". The methodological challenge in this is to gather adequate evidence to tell the story of how INSO has made a difference, tracing back through the causal chain to illustrate how it came about. The complexity limits the methodological options to primarily a case-based approach, but a heuristic evolved during the review to aid in answering this latter question.

2.1.1.6 Lack of baseline data

Except for annual platform satisfaction surveys for members, INSO lacks a monitoring, evaluation and learning system sufficient for capturing its impacts. Apart from consulting its data for trends in the conflict and safety environments, it allocates little time for platforms to systematically capture, reflect upon, package and share their experiences and processes. Baseline data used by INSO in its donor and other reporting has been limited to outputs and measures of satisfaction, although periodic attempts have been made to capture 'success stories' illustrative of impact. This review was conceived mainly to identify indicators of impact at different levels, illustrate them and explore options for capturing them more effectively – in other words, to lay the groundwork for

internal monitoring, eventual external evaluation and meaningful demonstrations of INSO's value.

This absence of a clear point of departure for the review has had implications for its methodology. To shed light on the problems INSO seeks to address, the first necessary step has been to define, diagnose and delineate the safety policy and practice environment within which INSO operates and works to influence. Second, identifying indicators has been a largely retrospective exercise involving extensive interviews with staff and partners who, for the most part, are not yet in the habit of thinking critically about INSO. A degree of systematic 'evaluative thinking'³ is evident at the level of INSO's senior management, but only rarely among platform staff who are most closely acquainted with INSO's interventions and are positioned best to track their outcomes and impacts without waiting for an external reviewer to do so well after the fact.

A caveat is necessary: many platform staff have a strong intuitive sense of the operational outcomes and impacts of their work and use this daily and instinctively to guide the assistance they provide to partners. This is an important capacity to build on. However, INSO's platforms are busy, and of necessity, they are focused on real-time challenges and the anticipation of unfolding ones on behalf of partners. Even at the operational level of impact, very little is written down that captures the nature of the safety problem, analyses its causes, describes how the causes were addressed by INSO, to what effect and by what measure. Compared to an evaluation using baseline data as a start point, for this review more effortful digging and a degree of innovation has been both necessary and useful for enabling the identification of meaningful indicators of impact and illustrating them.

2.1.1.7 Limits inherent in quantifiable indicators

Since the advent of result-based management there has been a thrust in evaluative methodologies that elevates quantifiable indicators above methods that are not easily scored but ultimately lead to better understanding of how an intervention makes a difference in complex environments. Three choices emerge: a review of impacts that seeks to isolate meaningful indicators could tie itself in knots trying to quantify them; it could assess quantifiable measures of outputs as proxy indicators of outcomes and impacts, or; it could supplement and build on proxy indicators with narrative accounts and in-depth analysis of experience. By placing a premium on the experiences of those who make use of INSO products and services in the field, this review takes the third track, although a questionnaire intended to establish a baseline that can be scored has been furnished separately to INSO.

2.1.1.8 Safety and access are in the eye of the beholder

The impacts of INSO interventions on safety and access can be difficult to capture and attribute with high confidence because of

wide variations in tolerances for risk between organisations, their adaptive capacities and different organisational cultures. Up to a certain nebulous point, safety and access are inherently subjective perceptions: not much can be learned from surveys asking whether INSO improved safety or access. Again, this points to the value of case-based enquiry: if an INSO partner ascribes greater safety or access to INSO, how and under what conditions did this happen? Why did one partner perceive greater safety or access more than another? Why did some agencies constructively act on information or advice from INSO, while others were constrained in doing so?

2.1.1.9 Donor preferences

Reflecting the growing need among donors to demonstrate the impacts of how their scarce resources are being used, and their concern over results achieved in terms of aid effectiveness – particularly around aid agency abilities to stay and deliver -- current donors to INSO expressed several needs they wanted the review to address, and how:



Field Note 1.

"INSO has powerful stories to tell, but it doesn't tell them very well. It needs to explain better what it does, and what its impacts are." **Donor representative.**

"INSO's log-frame is input-related. It needs to improve its indicators of impact, which aren't reflected in the log-frame at all. We're a partner in this process: we don't expect everything to be expressed in numbers." **Donor representative**

"The most meaningful impacts come by way of feedback from NGOs that are working with INSO products. Qualitative feedback. The average satisfaction ratings INSO gives us are good, but data needs to be embedded in a wider story of impact. How is INSO impacting their safety and decision-making? How is it improving their operations? How do the safety services and products enable organisations to spend less? Is there a cost reduction? It's not necessary to quantify everything." **Donor representative**

"How have INSO services changed things? How did it look before, how does it look now?" **Donor representative**

"Indicators can be quantified. For example, the question could be asked, 'In the event you hear a rumour of a possible incident, who do you go to? 1) Always INSO. 2) Sometimes INSO. 3) Never INSO. The cold fact of the matter is that donors have needs to 'score' whether

³ See van Brabant (2016). 'Evaluative thinking', 'reflective practice' or 'learning in practice' are organisational mindsets in which programme staff routinely engage in critical reflection on their work, asking evaluative questions during implementation.

programmes are meeting their objectives of what they're supposed to deliver." Donor representative

2.1.2 Limitations of the review

The previous review attended in detail to INSO's emergence, growth and consolidation. It recommended internal measures and processes aimed at strengthening INSO's foundations, and except for the continued absence of a human resources cell, these appear to have been acted upon by INSO. Internal dynamics and processes have been considered in this review only insofar as they have facilitated or impaired INSO in fulfilling its mission and achieving its goals. There was insufficient time to go beyond this. Relatively minor internal issues with a bearing on impacts came to light during platform visits, and most of these were suggestive of proactive measures to enhance INSO's positioning for future options and expanding its impacts, rather than remedial measures to address internal problems.

Efforts were made with interlocutors throughout the review, and particularly with INSO staff, to differentiate between the purposes of this review and an external evaluation: specifically, it was stressed that the focus was primarily on identifying indicators for INSO's impacts and collecting evidence to illustrate them. Platform visits were preceded by a note to INSO Country Directors explaining this and inviting them to give advance thought to meaningful indicators and evidence. However, this purpose was not clear to all INSO staff. With hindsight, the purpose of the review should have been communicated more clearly, particularly to differentiate it from an external evaluation or performance assessment. It was sometimes difficult to convince staff that they were being engaged in a collaborative process within an organisation committed to continual improvement.

The review has been limited in scale, in terms of both time and geographic coverage. Three of INSO's full platforms (Mali, CAR and DRC) and its two monitoring missions (Ukraine and Kenya) were not visited, nor were all field offices visited during the platform visits. A planned visit to the DRC platform in Goma would have provided a particularly rich evidence base for exploring INSO's impacts on a rapidly evolving challenge in real-time. This visit did not occur due to visa problems and uncertain conditions on the ground. Future reviews would benefit from more advance planning to ensure optimum geographic coverage, while encouraging a greater degree of collaborative participation within INSO and among its interlocutors. At a minimum, a full debrief with the senior management team should be regarded as an essential component of the next review.

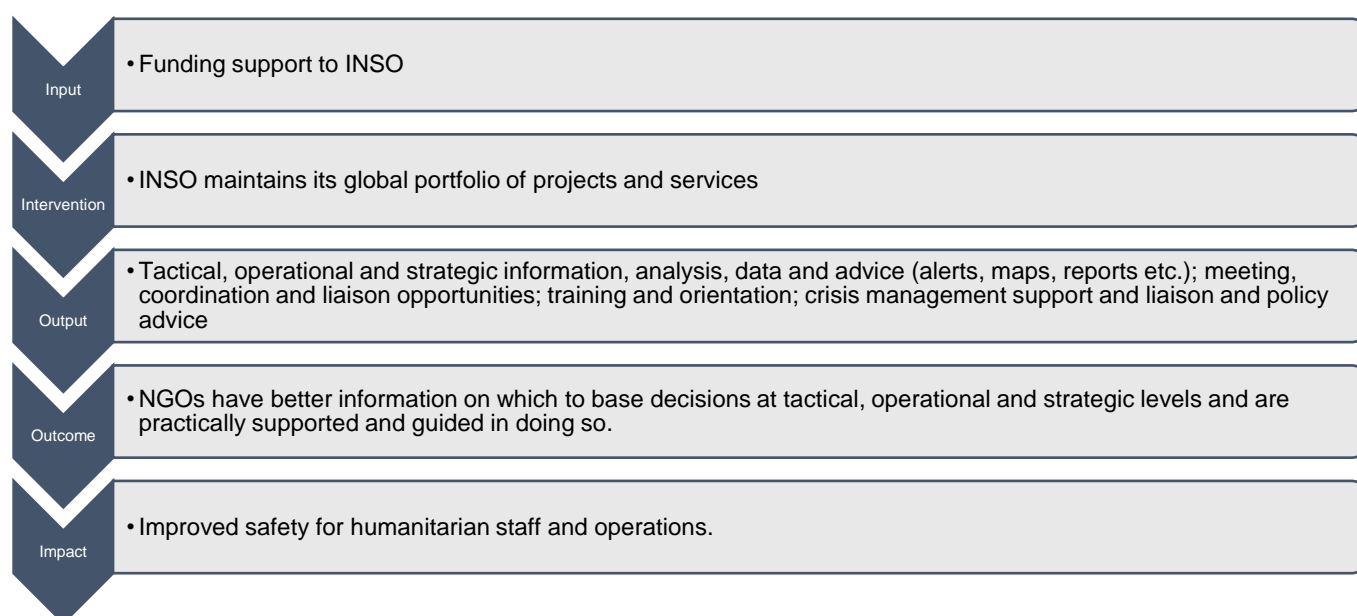
Partial access was given at the outset to proprietary INSO products, but INSO staff provided access to specific other products on request. Global products were not reviewed, but the CHDC was demonstrated in Abuja, Nigeria. INSO's Chief Technology Officer was not consulted during the review.

INSO's growing role in difficult contexts has influenced the structural underpinnings of the humanitarian apparatus at large.

2.2 INSO's current Theory of Change and Logistical Framework

Although INSO has not formally adopted a theory of change, the review has taken note of the working theory of change INSO uses for fundraising purposes. This asserts that through maintaining its global portfolio of projects and services, INSO will be able to provide information, analysis and advice to NGOs such that they will have better information on which to base decisions and are guided in doing so, with the ultimate aim of improving safety for humanitarian staff and operations.⁴

- numbers of severe humanitarian crises supported by INSO missions, showing that INSO is present in the field in direct support of humanitarian response;
- numbers of NGOs registered in INSO, showing that a large number are accessing and using their services in operations;
- average satisfaction ratings, showing quality and relevance to NGO needs;
- percentage of respondents agreeing that INSO helps them deliver aid more safely, showing that services support humanitarian access, and;
- percentage of letters of invitation from NGOs that result in scoping missions, showing INSO responsiveness.



INSO's current logframe⁵ establishes improved protection for relief personnel and improved effectiveness of humanitarian action as its impact, to be achieved by the maintenance of a centralised NGO safety coordination system providing direct support at all levels of humanitarian response, and indicated by INSO being maintained and remaining capable of delivering services at local, regional and global entry points. The projected result is that humanitarian organisations have access to timely, reliable and high-quality safety services that help them plan, operate and deliver aid more safely. INSO outputs are currently used as proxy indicators of impact to gauge progress toward these goals. They do not illuminate how impacts emerge out of INSO's interventions. They include:

These two working instruments are briefly revisited near the end of the report in light of what has been learned about INSO's impacts during the review.

2.3 Rationale, emergence and growth of INSO

INSO's impacts are in large measure a function of the set of circumstances in the humanitarian landscape that led to the organisation's emergence, evolution and growth. As such, it is worthwhile to trace those origins back and to unpack the decision-making that underlies INSO's ethos, structure and approach.

⁴ INSO (2019ii) "Supporting Humanitarian Safety," Proposal to DFID.

⁵ Ibid.

The earliest renditions of INGO safety platforms emerged out of necessity, usually as a collective, ad hoc response of like-minded agencies that were trying to cope better with emergent security risks and other contextual challenges. INSO represents the first and only initiative to establish standardised safety platforms that can be readily deployed when crises emerge in dangerous environments. INSO originated in the experience of the Afghanistan NGO Safety Office (ANSO). The founder and current Executive Director of INSO, Nic Lee, worked with the International Rescue Committee (IRC) in Afghanistan before and after the US-led invasion in 2001. He emphasises lessons learned from ANSO's emergence and eventual development into INSO to explain the features of INSO, its fitness for purpose, comparative advantages and added value.

Lee recounts how some fifty or sixty INGOs were active in Afghanistan under the Taliban with a very small expatriate presence and almost entirely staffed by Afghans⁶. The operating environment at the time was relatively permissive and stable. The invasion led to rapid structural changes and a serious fracturing of the humanitarian landscape. Approximately four hundred INGOs followed the influx of international military forces and, within them, there was a complete inversion of previous staffing ratios such that most were now expatriates. With the ascendance of warlords and intense military activity the operating environment for humanitarian work quickly became chaotic.

Tensions arose quickly in the humanitarian community as some INGOs and service providers gravitated toward international military forces for information and protection, while many others asserted a need to stay distant from them out of concern for safeguarding humanitarian principles and avoiding reliance on the military for their safety and security-related information. As Paul Currian notes, "...the only alternative source for security information were UN security reports, which suffered from bureaucratic restrictions that lead to accusations that they were vague, inaccurate and politically biased⁷."

Discussions at the Security Advisory Group at InterAction began in February 2002 around humanitarian safety coordination needs for Afghanistan. IRC volunteered to host and employ a security focal point to work on behalf of like-minded INGOs, funded through IRC by ECHO and in place by October 2002. This was the first iteration of ANSO. With guidance from a steering committee, the initial functions of the focal point, (currently a Regional Director with INSO), were to coordinate information sharing between INGOs and liaise with the international military presence on matters affecting their safety. By the end of the first year it became clear that international military forces were not being forthcoming with useful or timely information. The UN had been slow to deploy CMCoord officers, and private security contractors and INGO security officers with military backgrounds were dominating

approaches to humanitarian safety. The ANSO focal point helped to address these gaps and tendencies and ANSO became more a forum for INGO-to-INGO information sharing. ANSO provided a narrative that was distinct from information coming from governments and military forces, and from the UN.

As the IRC manager responsible for its hosting duties over ANSO, Lee came to regard ANSO as a problem. It was one of twenty IRC programmes underway in Afghanistan at the time and, in his view, it suffered from a lack of strong leadership, strategic direction from the NGO community and unclear structure. Products were not standardised and quality was heavily reliant on personalities. Further, "Hosting raised questions related to high overheads, organisational liability and reputational risk; it is worth remembering that at the time no NGO had the experience of managing such a project⁸."

IRC continued to host ANSO until a negotiated handover to Welthungerhilfe in 2006. Lee was retained for an interim two months to manage the transition but ended up staying for several years as ANSO's project director.

The priority was to form a strong advisory board from motivated INGOs with well-defined terms of reference to set objectives, define service delivery and job structures and set service delivery standards. The advisory board was most active in its first year and less directive over time. Gradually, ANSO itself became the guardian of the underlying values of the organisation as the start-up role of the advisory board waned.

As ANSO's role in Afghanistan became more widely known elsewhere, similar NGO safety coordination bodies began emerging, including⁹:

- In 2004, NGO Security and Preparedness (NGO SPAS) in Somalia first established by the Somalia NGO Consortium, later to become the NGO Safety Programme (NSP), initially hosted by CARE then DRC, and transferred to INSO in 2015;
- In 2007, Gaza NGO Safety Office (GANSO) hosted by CARE and transferred to INSO in 2015
- In 2011, the INGO Safety Advisory Office (ISAO) in Yemen hosted by CARE, and PAKSAFE hosted by the Pakistan Humanitarian Forum.

In his final report to Welthungerhilfe (hosting ANSO at the time), Lee recommended that ANSO be reconstituted as an independent INGO under its own leadership, but as part of a larger entity set up to establish platforms in other contexts. Welthungerhilfe rejected the recommendation, and simultaneously announced its withdrawal from hosting the ANSO project, leaving Lee with no

⁶ Interview with Nic Lee (Feb 2019).

⁷ Currian, (2011)

⁸ Currian, (2011).

⁹ Schneiker, (2016)

option but to move forward with his concept alone. His vision was that with the deployment of multiple NGOs to conflict environments worldwide, they would be "...routinely accompanied by the simultaneous deployment of their own independent safety and security body¹⁰."

INSO was established as a distinct legal entity in early 2011 when it was registered as a UK charity. When Welthungerhilfe withdrew from ANSO at the end of June the same year, INSO assumed management of the project with initial funding from SDC and ECHO (channelled through the Norwegian Refugee Council). As a priority, INSO emphasised the creation of durable and resilient systems so that the quality of its products and services would survive the turnover of staff and allow handovers to go smoothly without undue interruption or lapses in quality.

The INSO formula proved appealing to INGOs in Democratic Republic of the Congo (DRC) where they had struggled to form a safety platform but lacked a willing volunteer to host it. Their interest led to INSO's first scoping mission in 2011. This involved enlisting an advisory board, defining with them a scope of services for the platform, arriving at a plan for their subsequent participation and monitoring and feeding all of this into a donor proposal. The mission itself was self-financed by Lee since ECHO required that its partners be registered for at least three years: INSO as a new start-up had to rely in its early years on willing INGOs as funding intermediaries in exchange for a share of overhead. Donor funding was secured for the DRC platform which became established in May 2012, issuing its first information products and services in August 2012.

Other new INSO platforms quickly followed, with rapid rollouts being enabled by the ready availability of the standardised structure and menu of products and services first pioneered in Afghanistan: INSO Kenya later in 2012, Mali in 2013, Syria, Central African Republic (CAR) and Iraq in 2014 and Ukraine in 2015. Also in 2015, INSO took over GANSO in Gaza and the NSP in Somalia. A Nigeria platform and INSO's Operational Support Office (OSO) in Dubai were opened in 2016. INSO's newest platform in South Sudan opened in early 2018.

Lessons have also been learned by INSO about the 'how' of opening new platforms. In some it is necessary or useful to take a measured approach to introducing products and services, such as in South Sudan, where INSO began by offering training products to facilitate acceptance by authorities and the NGO community. NGO fora and donors are the usual first source of backstopping for a new INSO presence, while UN OCHA at field locations and in New York, as well as UNDSS, can also be called upon when additional support is needed. INSO also observes that it needs to adapt to different forms of NGO communities with each entry, but with a standard suite of products and services it tends to be easier to obtain agreement from advisory boards on the scope of services. Likewise, the availability of a standardised internal structure for an INSO platform makes the task of setting up go

more smoothly than an ad hoc arrangement. Once a platform has been established, in general INSO feels it is easier for it to remain in a setting compared with others whose main mandate is delivery of tangible goods: unlike its operational NGO members, INSO does not also deliver tangible goods (or services such as cluster coordination), relieving it of potential complications arising from multiple and potentially incompatible mandates. In general, INSO sees itself as readily adaptable to a wide variety of contexts.

INSO senior managers see INSO as having progressed through its birthing stage into its youth and now entering maturity. The emphasis thus far has been on building firm organisational foundations which include developing its reputation and reach with refinements to structure, further development and standardisation of products and services, and securing stable funding. As they enter the consolidated or mature phase, they anticipate reaping the rewards of effective management, mature policy and regulations, and a focus on excellence.

INSO represents the first and only initiative to establish standardised safety platforms that can be readily deployed when crisis emerge.

¹⁰ Lee, (2008)

2.4 INSO's context: Safety management in light of 'Stay and Deliver' / 'Presence and Proximity'



Field Note 2.

*"In the past there was more proximity. Loss of proximity has impaired programming. Everybody is now based in Goma. Programming people aren't permanently in the field. Loss of proximity becomes a risk factor because they just go in and out and see the context for a couple of days, or don't see it at all, then make programming decisions." **Veteran INGO worker in DRC***

In 2011, just as INSO was being formed, UN OCHA commissioned research to examine how humanitarian organisations were adapting to complex security environments. "To Stay and Deliver"¹¹ surveyed strategies and best practices in a variety of contexts where aid organisations were seeking ways to maintain their operational presence and continue delivering on their humanitarian obligations despite acute insecurity. Findings from the "Stay and Deliver" research, its 2016 successor, "Presence and Proximity"¹² and others (noted below) provide enduring waypoints for situating INSO and its activities on the humanitarian landscape, and a contextual reference to some of the problems and emerging opportunities that INSO was created to act upon. Noting an emerging shift away from the two extremes of risk aversion and recklessness that had characterised the previous decade, "Stay and Deliver" described a more recent trend toward risk management.

"Stay and Deliver" took stock of nascent measures for coping with loss of access to people in need, avoiding the 'bunkerization' that would distance aid providers from populations in need and otherwise resisting the contraction of humanitarian presence and the resulting declines in aid effectiveness. Mirroring much of what INSO's founders had concluded as INSO evolved, both "Stay and Deliver" and "Presence and Proximity" recommended greater availability of donor funding for NGO safety platforms, heightened attention to context and stakeholder analysis and for support to compatible information sharing systems at field level. Improved duty of care consideration for local staff and partners were cited as necessary to address persistent inequalities and transference of risk, including more financial, training and other resources for

local actors, echoing the more recent concerns of many INGO and LNGO staff interviewed during field visits for the review.

Jackson and Zyck (2016) noted incremental progress towards staying and delivering in "Presence and Proximity", observing that more organisations were maintaining a sizeable presence than five years previously. Writ large however, the humanitarian settings where lack of aid worker safety has been most acute continue to share at least some of the following features that serve to define INSO's operating environment – and its responses – in the field¹³:

- Loss of proximity to people and communities in need, declining presence, ascendance of remote modalities;
- Gravitation towards protective and deterrent strategies, 'bunkerization' and a de-emphasis on acceptance;
- Ascendance of commercial interests and security contractors involved in various aspects of humanitarian safety;
- A gradual decline in humanitarian fieldcraft such that capacities for achieving acceptance are reduced¹⁴;
- Donor and donor government dictates proscribing or limiting aid agency contact with certain armed groups;
- Proliferation of off-limits or no-go 'inaccessible' areas because of a presence of extremist groups or an otherwise nebulous security environment that is considered untenable. 'Inaccessible' areas often stay that way unless and until actual risks of re-engagement can be verified. Among large parts of the humanitarian apparatus there is little incentive, and diminished capabilities, for doing so¹⁵;
- Ascendance of duty-of-care considerations but a lack of clarity around obligations to staff and the more fundamental problem of how to balance these against the humanitarian imperative and the needs for proximity and effectiveness. Obligations to implementing partners, local staff and local partners not addressed on the same scale as for their international colleagues;
- Risk-transfer, such that proximity to people and communities in need, particularly at points of delivery, has been largely off-loaded to local staff while international staff are kept at a safer distance. Gradual increase in locally-led responses;
- A growing risk-management preoccupation with aid agency legal and financial liability should courts find that duty of care obligations have not been met;
- Less presence + lower profile = less acceptance + greater possibility of misperceptions, with resulting greater likelihood of attacks¹⁶;

¹¹ Egeland, Harmer and Stoddard, 2011.

¹² Jackson, Zyck, 2016.

¹³ Drawn except where otherwise noted from Egeland (2011), Collinson et al, 2013 and Fast, 2014.

¹⁴ See Jackson and Zyck, 2016, p. 63-64.

¹⁵ Interviews in Amman (for Syria), Erbil and Maiduguri.

¹⁶ Jackson and Zyck (2016) refer to "self-generated risks" in this regard.

- Expense. New costs accruing from a shift in emphasis from acceptance to protective and deterrent strategies, and changes to the ways that awareness of context is obtained:
 - Employment of guard forces
 - Fortification of compounds
 - Employment of analysts
 - Training expenses
 - Insurance premiums

In addition to the above features, the persistent problem of unstable aid flows as humanitarian emergencies proliferate is regarded by many NGO workers as a threat to safety. Unstable donor funding can affect programme quality. While needs persist, cuts can lead to greater dissatisfaction with the aid community, particularly as beneficiary lists are thinned out and distributions downsized. In areas that are already tense or prone to violence this can and does translate into NGO-related safety incidents in the experience of aid workers in the field¹⁷.

One other factor needs mention in a description of INSO's context for humanitarian safety management, expanding on the relative decline in the weight given to acceptance strategies:



Field Note 3.

"War waged in urban areas or massive influx of population into cities can challenge acceptance strategies. To the extent that humanitarian need becomes an urban phenomenon as a function of displacement of people to cities, and also to the extent that people are often moving around frequently because of conflict, acceptance can be harder to earn in urban environments than in rural areas or wherever populations are more stable and communities stronger. Lines of authority are often unclear where populations are in flux." INSO Deputy Director

In combination, these factors can overlap and interact in ways that undermine access and reduce presence, contributing to a maladaptive humanitarian response and, ultimately, decreased humanitarian effectiveness.

The access that small NGOs now have to specialist safety products and services is unprecedented, contributing to a smoother and more responsible transition to localisation.

¹⁷ Interviews in Kabul.

3 PART I: STRUCTURAL IMPACT

Various features of INSO contrast with some of the pitfalls of safety platforms of earlier days.

In the past there was far greater reluctance among NGOs to be forthcoming with security information, partly because they lacked confidence that information they shared would be kept private. Safety platforms had no people permanently based in the deep field, had limited and disconnected data on incidents and a predominantly militaristic outlook on security. INSO's redress of these situations has fostered improved expectations of safety platforms, their utility and effectiveness, laying the groundwork for eventual follow-on activities, such as headquarters-level policy and data initiatives.

INSO's structural impacts occur at global and local levels, but there is considerable overlap between them. In both cases, positive changes in the way safety challenges are managed by the NGO community result from INSO's ability to establish effective and durable safety coordination platforms, a legacy of the lessons learned by ANSO in Afghanistan. INSO's impact on humanitarian architecture is indicated by the fact that no other safety platforms have arisen since the advent of INSO in 2011. Further evidence of impact is indicated by INSO's on-request deployments to a wide array of diverse contexts. Increasingly, INSO is seen by the humanitarian community as a standard and necessary fixture of aid responses in difficult environments: *INSO has made NGO field safety coordination the new normal or has at least been the main architect behind the shape that coordination now takes.* There are several aspects to this.

INSO has largely replaced ad hoc and one-off safety coordination platforms with a standardised response system, with one result being that perceptions of field safety platforms have improved. Several advantages accrue from INSO's organisational structure. A self-reliant platform can ensure a high-quality level of service without the self-censorship that can result from a need to protect other aspects of a mandate. Senior INSO staff also point to more consistent management and clearer strategic direction as other advantages of the independent model, as well as uniformity of services between platforms while still allowing for contextual differences between them.

The independent structure adopted by INSO avoids problematic hosting arrangements and offers a channel to more sustainable platforms by creating structures purpose-built to engender trust among members and yield consistent results. One feature of this, though controversial when it was first introduced, is INSO's 'duty to share and participate' as reflected in its code of conduct. This ethos is believed by INSO to have become mainstreamed to the extent that sharing information is considered the default position of new NGO workers.

Adherence to humanitarian principles and INSO's demonstrated affinity with humanitarian values - in contrast to other actors present in conflict environments, including international military

forces and, sometimes, the UN when the latter is perceived as tainted by its political roles - make it more readily acceptable among like-minded NGOs. INSO communicates clearly about seeking to uphold those principles but, by the account of several members interviewed for the review, it is seen to practice independence and neutrality through the cautious manner in which it interacts with authorities, manages information sharing (preserving a high degree of confidentiality) and reports on conflict and context.

The independent model has also streamlined funding channels for safety platforms by providing donors with a greater uniformity of proposals and with faster and more predictable results, with the added benefit of protecting NGOs from exploitation by the private sector in their offerings of often-costly safety products and services. And as indicated by demonstrably reduced safety vulnerabilities and increased capacities among smaller local and international NGOs, this no-cost feature of INSO's offerings to its members has the impact of helping to level the playing field between the analytical capacities, and thus the risk management burdens, of larger and smaller INGOs and LNGOs. The access that small NGOs now have to specialist safety products and services is unprecedented, contributing to a smoother and more responsible transition to localisation in keeping with "Stay and Deliver" recommendations, and consistent with more recent commitments under the Grand Bargain. As noted elsewhere, small NGOs for whom the costs of maintaining an extensive network in the deep field would be prohibitive benefit from INSO's network and the information it provides as a common service.

3.1 Understanding INSO's "Stay and Deliver" impacts

Apart from its impacts on humanitarian safety architecture and the relative ease with which it can deploy effective platforms, INSO has a formidable positive impact on the ability of NGOs to withstand the challenges of dangerous environments to the extent that they can continue to operate effectively. As "To Stay and Deliver" pointed out, reactions to insecurity can be adaptive or maladaptive in terms of mounting and continuing effective programming.

Recalling INSO's operating context above, in the aftermath of shocks, a spike in incidents or even their gradual escalation, what appears to happen in the worst of cases is that the humanitarian apparatus can become caught in a cyclical feedback loop with maladaptive and escalating consequences for the humanitarian response. Incidents and shocks necessarily elicit strong reactions leading to loss of proximity and presence, that then leads to a decline in the availability of good information about context, which undermines in turn the quality and coverage of programming. As quality and coverage decline, needs escalate as acceptance measures are de-emphasised, giving way to a greater reliance on protective and deterrent strategies just as quality

assistance and protection efforts are most needed. Fortification further constricts the two-way flow of information between aid agencies and the communities they serve, and the likelihood of increased safety risks grows amid a declining ability for aid agencies to understand them. No-go areas sometimes become the norm, with little incentive to re-visit them amid a lack of information about prevailing needs to justify doing so.

Nothing in this is set in stone. As a heuristic, the diagnosis above is both a sweeping generalisation and an over-simplification. There are ample exceptions of good practice evident in the experience of operational responders and the exceptions indicate some of the possibilities for avoiding maladaptive reactions to threatening environments¹⁸. Comparative advantages for maintaining active presence include flexible donor funding, work that is – and is perceived to be – of high quality, adherence to humanitarian principles and provision of forms of assistance that are valued highly by communities in need. Locally led responses are becoming more common as donor resources become more available to them, and in some contexts, these have a comparative advantage over outsider-led programmes, with greater degrees of acceptance in some places.

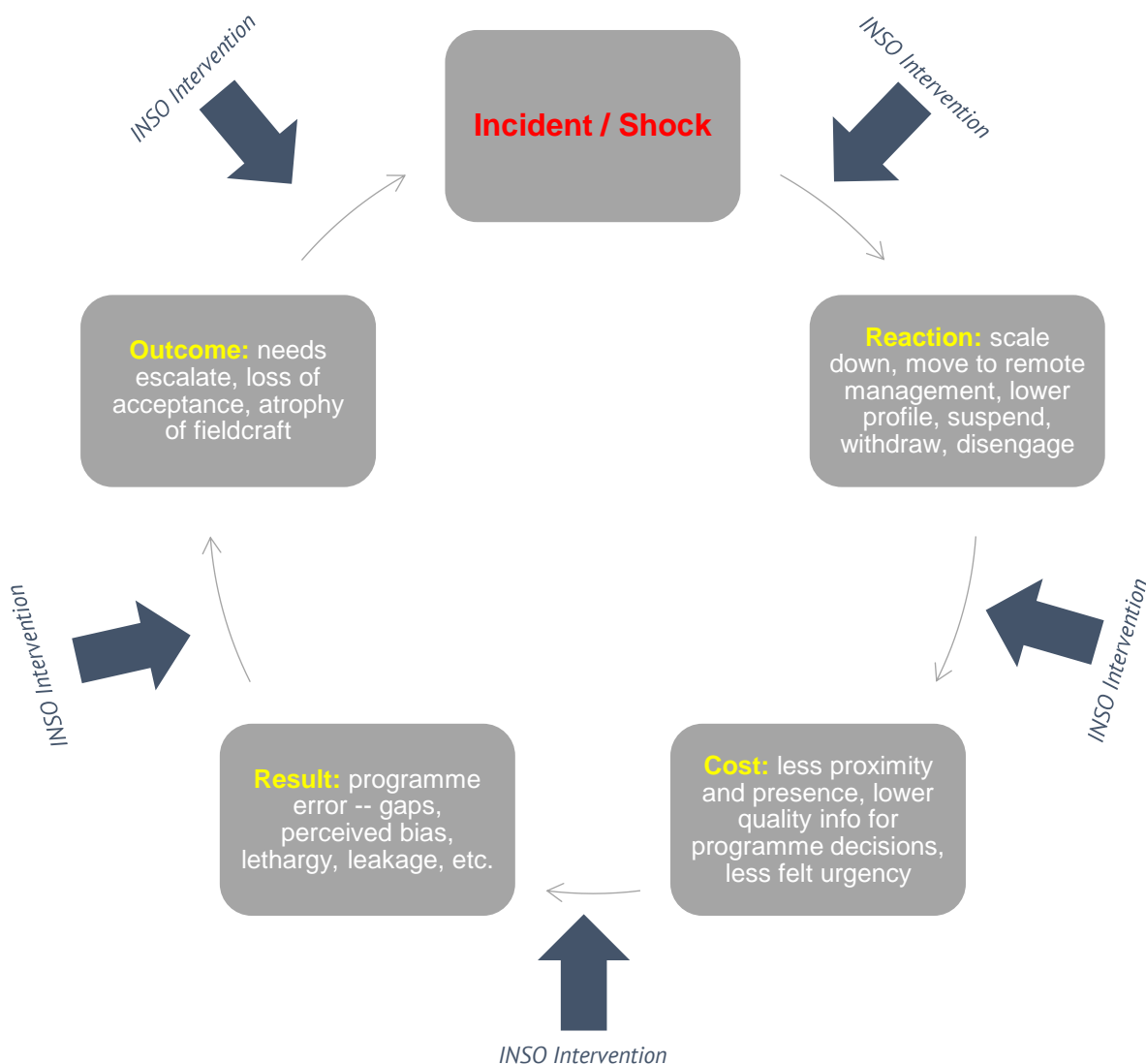
Beyond the exceptions though, if presence and proximity are compromised or threatened in the ways cited above, where does INSO come in and what happens? Evidence gathered during the review is instructive. INSO's interventions through its various products and services, (like judicious decisions taken by all others in the response), *can and do act to disrupt the cycle at every stage*. When the operating environment is conceptualised in this heuristic way, the structural impacts of INSO's interventions become more apparent and the indicators for those impacts more easily unearthed.

The narratives heard during the review indicated some of the different ways that the maladaptive cycle is disrupted by INSO, and how INSO helps to professionalise responses to severe insecurity:

1. Risk assessments are validated or invalidated by verified facts, undermining tendencies to either under-react or over-react;
2. Safety postures are calibrated to prevailing risks. Risk mitigation and preventive measures are adjusted accordingly, while avoiding undue loss of proximity and presence and unjustifiably severe shifts toward protective and deterrence measures;
3. Where a reduction of proximity or presence does occur, channels are kept open to good information for evidence-based programming and safety decisions through INSO Field Monitors and partner networks. Information is verified before release, rumours are dispelled or verified;
4. Throughout, crisis support, coordination and training interventions help professionalise responses to shocks, increasing the likelihood that a) incidents are avoided, and b) the human effects of attacks are reduced, reactions to incidents are calibrated to their severity.

The disruptive interventions can be visualised in the following diagram:

¹⁸ See in particular Jackson and Zyck, 2016, where refinements in remote management modalities are noted.



By intervening at various stages of the shock/reaction cycle, **INSO helps partners to accurately calibrate their security postures to prevailing risks**, reducing the possibility of under-reaction to threats while safeguarding humanitarian effectiveness against over-reactions that can result in loss of proximity to victims and unjustifiably severe or lengthy shifts to costly protective and deterrence strategies and a de-emphasis on acceptance strategies.

Without facts and a clear understanding of the causes of safety incidents, fear can and often does result in reactions that are unsupported by evidence of actual risk. It is an eminently human reaction to uncertainty when the risk environment is unclear. In the face of such uncertainty, it is also a responsible management decision to attend to duty of care obligations by curtailing or scaling back humanitarian programming and movement until risks are clarified.

Three cases from Syria are illustrative of how INSO acts to contain reactions while clarifying the risk environment:



Field Note 4. (i of iii)

In a contested area in Syria, a small and recently registered NGO reluctantly reported to INSO that two of its staff had been arrested while travelling. Up to then, the area had been considered relatively permissive for NGO movements. Movement protocols that INSO had helped to propagate were widely known and followed. For several days it was unclear what had happened. The arrests led other NGOs to cease movement. Life-saving work was disrupted. The INSO Safety Advisor asked the NGO for permission to discreetly share what they knew about the incident with a small number of other INSO members who were familiar with the area. The expectation was that they would be able to provide additional detail. Within three days, feedback to INSO clarified who had made the arrests, and why. The aid

workers had become complacent, straying from known movement protocols applicable to the area.

In this situation INSO did *five things*. First, in an opaque and unsettled landscape it sought out facts in a creative way to clarify and understand an otherwise uncertain new risk environment. Second, it mobilised its network of NGOs to discreetly assist in this. Third, it helped facilitate the release of arrested aid staff. Fourth, it minimised the duration and scale of changes to security postures and a resulting reduction in humanitarian programming. And fifth, it used the opportunity to issue a forceful reminder to NGOs about the importance of staying alert and abiding by movement protocols. The identity of the affected NGO was kept anonymous throughout. INSO impact was indicated by NGOs resuming operations commensurate with needs.

Another case from Syria similarly demonstrates how INSO enabled continuity in humanitarian response when safety risks were uncertain:



Field Note 5. (ii of iii)

In October 2017, Raqqa city in northeast Syria fell to Kurdish forces, allowing for a rapid response by INGOs and NGOs. However, recurring IED and mine incidents soon led humanitarian actors to restrict their movements, impairing the speed and effectiveness of their life-saving programming as a result. INSO tracked and analysed these incidents. It was able to detect in them a pronounced pattern: for the most part IEDs were precisely planted and targeted at military actors early in the morning. INSO conveyed these findings to the aid community, which cautiously re-engaged with adjusted safety postures. A humanitarian response commensurate with need was enabled.

INSO consulted its data on the IED attacks, detected patterns, formed a judgement about risks posed to humanitarian actors and propagated this new information promptly throughout the humanitarian community on scene. Individual NGOs then did their own assessments and made decisions about how to respond, ultimately re-engaging with their beneficiary communities. INSO's impact was indicated by this timely re-engagement.

The final case from Syria demonstrates how INSO's activation of its analytical function resulted in defusing unwarranted fears of a major change in the operational environment for aid work, thereby helping to arrest injudicious loss of presence, proximity and delivery:



Field Note 6. (iii of iii)

In late 2018, posturing from the Turkish government about a Syria offensive was joined by an impulsive tweet from the US president announcing, unequivocally, an impending withdrawal of US forces. The news was received with alarm by humanitarian agencies in northeast Syria who, mindful of their duty-of-care obligations and the difficulties of mounting an evacuation, were rightfully concerned. Many humanitarian agencies anticipated a full-on military confrontation and a drastic constriction in humanitarian space, and quickly began consideration of programme suspensions, withdrawals and closures. The situation was further complicated by pressures from Kurdish authorities, who wanted humanitarian actors fully engaged in order to demonstrate to the population that its welfare would be looked after. In this chaotic environment, INSO's Safety Advisor in the northeast initiated nightly Skype conference calls with NGO team leaders to discuss verified and nuanced facts about troop movements. Although it was controversial at the time, INSO's observation that there were no substantive changes in the humanitarian landscape gave many NGOs pause to reconsider their impending decisions to leave, and to look at actual levels of risk. Precipitous withdrawals were averted, and humanitarian programming continued apace.

An example from Afghanistan shows how a structural impact can come about through INSO joint action with others to influence the aid community's reaction to shocks.

INSO is a standing invitee and active participant in the Humanitarian Access Group (HAG) in Kabul, hosted by UN OCHA. In early 2018, close collaboration between INSO, INGOs and an OCHA access officer helped stave off injudicious withdrawals and possible suspension of aid programmes amid a spike in serious incidents. Under the auspices of the HAG, a "Stay and Deliver Message" was generated with input from INSO and sent to the entire humanitarian apparatus. Counselling caution and the need to verify information, it reminded the humanitarian community about resources that could help them adapt to an increasingly difficult environment. It stands out as an example of a professionalised response to safety-related shocks, and of the potential of strong synergies between disparate actors.

The result of it was that NGOs were influenced to react to the spike in incidents in a more measured way, indicated by reporting of less disruption to presence, programmes and services than would otherwise have been the case. The message was followed by other coordinated efforts from HAG members to reassure the community and provide them with safety resources, advice and accurate assessments of risk. In part, the message reads as follows:



Field Note 7.

"In conclusion, the HAG strongly advocates for all concerned parties to Stay and Deliver so that those we came to assist are not left behind during times of heightened tension but that we will work together to find practical and innovative ways to fulfil our mandated activities. The HAG encourages NGOs to seek advice from INSO and the HAG to ensure full assessments on foreseeable risks and as much as possible discuss unforeseeable ones..." HAG message, Kabul, 02 Feb 2018

In northeast Nigeria, INSO cooperated with the NGO Forum to lead two security assessment missions to Rann following a spate of serious incidents, with a view to investigating possibilities for the resumption of programming. Similarly, following an attack on Monguno in Borno State, all humanitarian agencies pulled out. Within one-week INSO went back to conduct a security assessment. As a result of INSO's reporting on conditions, agencies undertook their own assessments and began to return. Their return indicated an impact that was at least partially attributable to INSO's intervention.

Absent such visits, there can be a tendency for areas to be regarded as "off-limits" or "no-go" areas. Sometimes a certain mythology develops around a place or a set of combatants because of one or a series of incidents. Unless these beliefs are ground-truthed through site visits, they can persist for an inordinately long time, allowing accessible needs to go unmet when the security environment has changed for the better.



Field Note 8.

"Because of INSO, NGOs are going where they weren't going before." Donor representative comment on access in Somalia.

3.1.1 INSO and the Saving Lives Together (SLT) framework

INSO is a partner in the SLT, a set of recommendations intended to improve collaboration between the UN system, INGOs and IOs on humanitarian safety issues in the field¹⁹. It was founded on the logic that safety issues are collectively experienced by all humanitarian actors, and that collaboration by all elements of the humanitarian apparatus will help ensure safe delivery. The intent is to encourage cooperation in the collection, analysis and dissemination of security and safety information, and collaboration on solving safety challenges that arise. The

framework recognises the different risk thresholds and understandings of safety challenges by the SLT's various partners, and the operational decisions made by each agency remain the responsibility of the respective organisations.

At a headquarters level, the SLT Oversight Committee (OC) is comprised of UNDSS, UN line agencies, EISF, ICVA, SCHR and InterAction. INGO fora and individual INGOs can be invited to join the OC. Notably, INSO is not a member and has not yet been invited to become one. UNDSS and UN OCHA provide headquarters-level support to improve information sharing and safety coordination at field level, as well as to resolve safety coordination problems as they arise. INGO partners in the SLT undertake to nominate representatives to engage with the UN's Security Management System (SMS) through UNDSS in the field.

INSO is normally requested by its members, (usually comprising the majority of INGOs who are present), to assume the INGO representation role in the SLT. Under the SLT, UNSMS and INGO representatives are encouraged to grant one-another observer status at their respective security forum meetings. The framework acknowledges, however, that partners may be constrained in the information they share by the need to preserve confidentiality, credibility and integrity. Accordingly, not all INSO roundtables or other safety-related meetings are open to the UN, particularly where the UN is not perceived to be a neutral actor. While some INSO platforms (e.g., Somalia) grant automatic access to INSO information and analysis services to UNDSS and UN OCHA as part of the SLT Framework, in others such sharing is circumscribed and on a case-by-case basis due to perceptions of the UN system and INSO's need to safeguard the confidentiality of sensitive information coming from its members.

Where requested, INSO represents INGOs in implementation of various aspects of the SLT through meetings with UN security managers on security-related needs including, for example, contingency planning for evacuation of aid staff. Established INSO platforms help to ensure a more consistent, reliable and discreet sharing of security information from the SLT with NGOs and, as their representative, INSO drastically reduces the number of organisations that other parts of the SLT must coordinate with. In this role, INSO helps the NGO community to make safety-related arguments to the HCT or UNDSS that are informed by specialist advice.

In Nigeria, INSO and UNDSS take turns leading presentations on safety and security at alternate meetings of the UN-led Humanitarian Country Team (HCT). In a number of platforms including Afghanistan and Somalia, INSO has provided a counter-narrative to UNDSS that is aligned with humanitarian principles, whereas UNDSS is constrained as a UN agency by political stances adopted by the UN at the behest of UN member states, that usually are also parties to the conflicts in which INSO platforms operate.

¹⁹ Inter-Agency Standing Committee (2015)

In the platforms visited for this Review, INSO staff recognised the requirement and the logic of cooperating with other actors within the SLT framework. Some platforms have put significant effort into doing so, but the effort has not always been easy to sustain in the face of inconsistent results. It emerged with consistency in interviews that SLT usefulness was hit-or-miss due mainly to unreliable UNDSS information on the security environment, varying levels of accessibility and professionalism among UNDSS staff, and the seriousness with which UNDSS country staff treat the SLT²⁰. In Hargeisa, for example, no-one among the INGOs interviewed for the Review knew who the UNDSS representative was or how to find him.

In all platforms visited for the review, INSO members and staff alike noted lapses in the quality and relevance of information available from UNDSS, often attributing this to the poor quality of information available to UNDSS through its own channels (typically including other parts of the UN system, embassies, host governments, military forces and private security contractors.)

Apart from the advantages of a well-functioning SLT for INSO members, INSO has an interest in maintaining a good relationship with it. As an INGO, INSO is as vulnerable, and sometimes more vulnerable due to the nature of its work, to the whims of authorities. It is quite plausible that an INSO platform will at some point need backstopping from influential actors in the humanitarian apparatus to safeguard its continued presence from displeased authorities – the South Sudan platform comes particularly to mind.

As a representative of INGOs, INSO has the responsibility to continue the pursuit of constructive engagement with UNDSS and the SLT at field level, despite the disappointing inconsistencies in results so far. One adjustment is necessary, however. When an urgent or life-threatening issue arises that is of concern to INSO members, (evacuation and contingency plans in particular), INSO Country Directors should seek the assent of their membership to assert their needs forcefully with the UN's Designated Official and Humanitarian Coordinator. In the unfortunate event that the DO / HC is unhelpful, INSO's Executive Director has the option of making representations to the UN's Emergency Relief Coordinator and donors, as well as to the SLT's Oversight Committee. Absent substantive changes in the way the SLT is regarded and administered, it is apparent that the only available option for improving its performance is to ensure that when it falters, those responsible are held to account. Reliance on the vagaries of personal relationships is not a sustainable or durable way to make the SLT work.

In the interests of achieving greater impact on important policy discussions, there would be merit in INSO asserting itself, (perhaps through donors and prominent INGO HQs), for a seat at the SLT Oversight Committee to work for change from within. INSO's added value on the OC would be its direct real-time pipeline to concrete experience with the SLT in the field. As mentioned below, INSO is well-positioned to assemble case-based evidence on the performance of the SLT to further illuminate what works and what does not, and why. Specifically, INSO could work towards more consistency and clearer lines of UN accountability over UN adherence to the SLT Framework at field level and simplification of sign-off procedures for urgent safety-related plans, such as evacuation protocols or contingency plans.

3.2 Conclusion

To conclude, **the review has found that INSO is having an important and positive structural impact on the adaptive capacities of NGOs and others when faced with acutely dangerous environments.** It does this primarily by bringing to bear a range of products and services that help the humanitarian community to more accurately calibrate its security postures to prevailing risks. Part II looks at evidence of impacts at the operational level that, often in aggregate and over time, help to enable these more adaptive structural responses. Part III reviews options for assessing and optimising impacts in both areas.

By intervening at various stages of the shock/reaction cycle, INSO helps partners to accurately calibrate their security postures to prevailing risks.

²⁰ In Nigeria, UNDSS drafted an evacuation plan for 30 aid staff, when 147 were in potential need of it. Accordingly, the estimate of needed UNHAS resources for helicopter airlift were grossly insufficient, i.e., 15 trips vs. 3.

4 PART II: OPERATIONAL IMPACT

At the operational level, INSO's impacts on day-to-day humanitarian operations and safety management are formidable and take several forms.

There is considerable overlap with structural impacts. Cumulative operational impacts of INSO interventions over time appear to lead in some cases to more persistent and structural impacts, and as such can be considered to form the foundation for downstream or structural impacts. For example, in the Syria example from Raqqa above, NGOs would not have been likely to assign much weight to INSO's analysis of patterns in IED attacks had they not already trusted INSO as a proven technical resource in such matters.

In many of the examples cited below, a pattern emerges with enough consistency to suggest that indicators of positive impact at this level can be classed very generally as *a reduced vulnerability or an improved capacity*, but this is not formulaic: details are lacking, and causality is often not clear enough to attribute impact solely to INSO without taking full account of other variables. As a point of departure however, the concept is useful for isolating some indicators.

4.1 Impacts achieved through INSO as enabler of crisis management

INSO staff have provided real-time, life-saving crisis support to partners during critical incidents, and according to INSO, its platforms are involved in an average of one such incident every two days. Such crises include abductions, detentions, assaults and attacks, evacuations, medical emergencies etc. INSO typically plays a supportive rather than a management role, e.g. through provision of specialist information and analysis; referrals to service providers, such as trauma counselling; stakeholder analysis, and; representation. In some contexts, INSO can also make a communications-equipped crisis management room available to affected agencies who find it advantageous to relocate their crisis management team out of their own office to allow for better concentration for the team and programme continuity in the home office. INSO will only rarely become involved in providing direct crisis management and, as such, impacts will only rarely be attributable solely to INSO, such as in the Jalalabad case described below. Notably, crisis support is augmented by ongoing trainings for NGO staff in crisis management, reducing a vulnerability (to ineffective crisis management or panic), or strengthening the capacity to absorb a shock, leaving open the possibility of downstream, cumulative – or structural – impacts in the 'stay and deliver' vein.

Victim and NGO confidentiality around cases of crisis support means that this aspect of INSO services is not widely known. However, the following three cases illustrate INSO roles as they were played out in real-time:



Field Note 9.

During a rocket attack on the airport at Maiduguri, an NGO's staff took shelter in a safe room. They were in touch with INSO. Once the detonations stopped, they intended to leave the safe room, but INSO advised them to shelter in place because of reports of small-arms fire that they were not aware of.

In Jalalabad in early 2018, a violent incursion into an INGO compound led to most staff taking shelter in a safe room. Two others had been killed inside the compound, and a civilian outside. With the attackers in the compound, staff sheltering in the safe room contacted the INSO Safety Advisor by mobile phone. The SA immediately contacted the police to advise them where in the compound the INGO staff were located. After a protracted firefight the staff were released safely by the police. INSO alerts had been sent to members in real-time, and in the days immediately following the attack INSO issued extensive analysis on the incident and others that had preceded it, propagating thorough and updated risk assessments to the NGO community. Safety postures were adjusted accordingly.

Following the abduction of an IO staff person in Somalia, INSO was enlisted to assist with actor mapping, eventually helping to isolate the general area where the victim was being held.

4.2 Impacts achieved through INSO as repository and channel for incident data

Daily, and in multiple conflict environments, safety and security managers and programme officers of INSO members and partners routinely seek out and take INSO information and advice into account when making staff movement and programming go / no-go decisions, often using information from INSO to triangulate with their own. INSO data is valued highly for its timeliness, relevance and accuracy. INSO Safety Advisors, Deputy Safety Advisors and Deputy Directors in some platforms routinely spend up to 80% of their days responding to numerous phone, Skype and in-person requests from NGO partners and others for input on a variety of decisions.



Field Note 10.

*"I get 10 calls every morning. 10 NGOs who are calling INSO before they send people out [to the field]". **Deputy Safety Advisor in Afghanistan***

*"Especially during the elections, we used the information we got from INSO to help make our go / no-go decisions. Sometimes we don't deploy our people because of what we've heard." **Country director with local NGO, Somaliland.***

*"We sent a mission to Burao one day. Once they were in the area, we got an alert from INSO about a land conflict and shooting in the area where they were headed. We immediately contacted our team and they were able to avoid the area at the last minute." **Small INGO in Somaliland.***

***Lutheran World Federation in South Sudan** was considering an assistance programme in an area of refugee return in Eastern Equatoria but had no presence there. INSO was able to provide LWF with an interactive incident map that informed a decision on deployment of a consultant. INSO also reviewed their security plan.*

*"INGOs can be under dual pressures from their headquarters. There is a tension between duty-of-care considerations vs. wanting to be present in the deep field. Information from INSO is considered reliable and can be used to support the arguments [for presence and proximity] we make at country level." **Former INGO head of mission, now a donor representative in Nairobi***

The added value of this input for humanitarian operations is a product of the granular contextual information that INSO has at its disposal and can otherwise be difficult to access. This is a function of INSO's established networks of field monitors (FMs) in volatile areas as well as the information that INSO members are required to share. The evidence indicates a growth in this form of impact as platforms mature and networks become larger and more active. The South Sudan platform is a recent example: granular information from the field has only recently been starting to flow from the platform's nascent FM network, but is already showing results to NGOs making aid deliveries. A DSA in South Sudan related an experience in which he got the word out to NGOs to avoid a certain area in which an assassination had just taken place and in which subsequent violence was likely. The NGOs were able to avoid sending staff on mission to the area: a vulnerability to violence was reduced, while their capacity for situational awareness was increased. Large IOs that routinely establish their own field networks have also found INSO's network a complement to their own.



Field Note 11.

*"Big INGOs have budget lines for conflict research. ICRC has its own networks here but even so, we don't know all armed groups. It's still a challenge." **Safety advisor with ICRC in Juba***

Drawing from its incident data and reporting from its FMs, INSO's scheduled and on-demand reporting serves to verify facts on the ground, contributing to myth-busting and avoidance of under-reaction and over-reaction to real and perceived insecurity and inaccessibility by providing timely, fact-based analysis. The experience of a medium-sized INGO in Afghanistan is illustrative of the many ways INSO varied offerings are utilised. It has adopted a conscious strategy of 'nationalisation', taking incremental steps toward turning over management and operations entirely to Afghans, with the eventual goal that it will become an Afghan NGO. INSO has played a major role in the process, by providing no-cost trainings to many of the NGO's Afghan staff (increasing capacities) and working with them to conduct site and policy reviews (reducing vulnerabilities). INSO reports are also used by the NGO to help justify budget lines for staff safety.

In Iraq, INSO's Advisory Board asked it to prepare a report on the possible safety implications of a referendum in the Kurdistan Region of Iraq. Many NGOs pulled out; some were preparing to leave. INSO's report helped to confirm INGO decisions to stay. In South Sudan, Lutheran World Federation (LWF) was considering an assistance programme in an area of refugee return in Eastern Equatoria but had no presence there. INSO was able to provide LWF with an interactive incident map that informed a decision on deployment of a consultant (reducing uncertainty). INSO also reviewed their security plan.

INSO incident data and analysis have informed strategic decisions taken by senior management of operational humanitarian agencies, particularly in assessing accessibility of geographic areas in places of acute need and in allocating necessary resources for successful adaptation to difficult environments.



Field Notes 12.

*"In Yobe State [Northeast Nigeria] we wanted to start work in a new area. We had a map indicating the most-needy areas. We overlaid that with INSO's incident map, and this helped us to identify more accessible areas of need." **Deputy country director with INGO in Maiduguri, Nigeria***

INSO has no control over how its incident data will be used, but there are examples of it being used to good purposes even by those who are not INSO members. UN OCHA in Syria, for example,

has used raw INSO incident data to inform its analysis for the annual Humanitarian Needs Overview. In northeast Nigeria, staff from UN Mine Action Service met with INSO immediately after their arrival to obtain data on incidents involving explosive detonations. Very little data was available from any other source on IEDs and unexploded ordnance (UXO). INSO's incident data was credited with helping UNMAS there during its "business development stage" to grasp the extent of the challenge it faced, and later to determine where it had missed something. In another case, a REACH analyst covering Syria used conflict reporting from INSO as a trigger to humanitarian assessment.

4.3 Impacts achieved through INSO as common service

A major part of the rationale for INSO is that it provides a common service. The evidence that has emerged during the Review confirms that amid the multiplicity of actors present in humanitarian contexts, it makes far more sense for one highly-specialised organisation to service a set of common needs among a given set of actors, (in this case, mostly INGOs and NGOs), than for each actor to grapple with and underwrite those services themselves. It saves time and scarce donor resources and prevents duplication.



Field Note 13.

"The amount of time and energy we would have to invest in incident tracking of a quality that comes close to the quality and reliability of INSO would be enormous."
Safety Advisor with a large INGO in Iraq

"We coordinate on a daily basis with INSO on access in real-time. We have our own networks but INSO follows the trends."
Small INGO in Afghanistan

"INSO eases the management burden. It saves me time, and because it has a bigger network than I could possibly afford to put together, I have better access to information than I would if INSO weren't here."
Country Director of small INGO in Afghanistan

"A lot of NGOs can't afford to pay for [safety] training because they have difficulty getting support costs."
Local NGO in Juba

An INGO with no prior experience working in a conflict area relied heavily upon INSO as it was becoming established, making use of INSO services to write safety SOPs and policies, and to ensure its inclusion in evacuation plans.

"INSO helps us to protect our beneficiaries by helping us to protect ourselves,"
Local NGO in Juba

INSO's role is not only cost-effective. It also provides a framework for coordination among and between actors that is more conducive to successful and sustainable outcomes than would be the case if each organisation were acting alone and on its own initiative. During the review, INSO's Horn of Africa CD was asked by an INGO task force to participate in discussions around relocation of their country offices to Mogadishu from Nairobi, and to provide input on the prevailing environment, safety implications and preparedness for the move (reducing uncertainty and potentially reducing vulnerability). At the end of the meeting INSO was asked to prepare briefing papers exploring implications for trainings of NGO staff, assessment and advisory capacity of NGO offices, residential facilities, transport and meeting facilities in Mogadishu.

In both respects, INSO bears a resemblance to UNHAS: in the absence of a common humanitarian air service, the costs and chaos involved in getting aid staff and cargoes where they needed to be would be immense and, ultimately, unsustainable. Effectiveness, access and safety would suffer. Likewise, in the absence of INSO, safety would be compromised and safety-related costs borne by individual NGOs would be substantially higher than they already are. Humanitarian access and effectiveness would pose even greater challenges than currently. INSO platforms contribute to more conducive operational environments and safer ways of working that enable - and contribute to the resilience of - principled, timely, effective and cost-effective humanitarian responses.

As a common service available to all members regardless of their size, INSO helps level the risk-management playing field. As one member observed in Nigeria, smaller NGOs can take longer to engage in a new area - or re-engage with it after they have left it following an incident - because they lack the capacity to conduct thorough site visits, context analysis and risk assessments. INSO products such as area assessments and on-demand services, such as incident reporting and other real-time information on road and checkpoint conditions etc., help smaller, less-equipped NGOs make sound judgements about re-engagement or new engagements with an area (reducing uncertainty and reducing vulnerability).



Field Note 14.

In Somaliland, a small INGO found that the information available from authorities about possibilities for movement and prospective new areas for operations was often politicised, and sometimes dangerously unreliable. Corruption, land conflicts, clan expectations and the difficulties navigating through staffing decisions made for a high probability of complications as the INGO started new projects, but the resources available to the INGO to spend on context analysis and safety measures were extremely limited. The INGO used INSO information products and advice routinely to help inform movement decisions, add to their understanding of new

programming locations, and keeping well-apprised of conflict dynamics in areas of ongoing operations, such as land or clan disputes of the sort that could easily cause problems for, or be worsened by, an ill-planned humanitarian effort. INSO also provided this INGO with specific advice on siting new office outposts, such as the availability of water and electricity, the proximity of various authorities, and other technical and contextual information needed for assembling a high-quality security plan and an appropriate safety posture. So far, it has sent eight of its local and international staff to personal safety trainings provided free-of-charge by INSO, as well as additional people to new-staff orientations likewise hosted by INSO.

4.4 Impacts achieved through INSO as author / editor of a common, independent and humanitarian-focused narrative

The set of lenses through which INSO views conflict and humanitarian safety is unique. Unlike most other security-related actors in war environments, INSO has the dedicated time, the specialised resources and the inclination to view conflict and safety-related developments through a uniquely humanitarian set of lenses that are not tainted by political biases. Put another way, the bias in INSO's safety narrative is explicitly humanitarian.

There is widespread respect for the quality of reporting and analysis provided by INSO on situations that, by their nature, are contentious and rife with misinformation and rumour in every context. INSO debunks misinformation that can confound movement decisions and operations, reducing uncertainty and potentially reducing vulnerability. This is a huge responsibility borne by INSO, but those interviewed were almost uniformly positive in their assessments of INSO's conservative and thoroughly fact-checked approach to reporting on conflict, safety incidents and the landscape for humanitarian operations.



Field Note 15.

*"A western embassy issued a warning against the presence of its nationals, describing an imminent threat. We had several staff from [that country] and they were concerned. We consulted INSO, they looked into it, and we decided that the threat was not credible." **Safety advisor with an INGO, Somalia.***

The value in the narrative provided by INSO takes several forms. First, it caters specifically to a humanitarian audience that is at least nominally characterised by the shared need for adherence to humanitarian principles and values.

Second, the INSO narrative reflected in its real-time alerts, reporting and analysis serves as a counterweight to other sources of information. Propaganda and other forms of weaponised information are not new, but these have taken on new forms that are more effective more quickly than before. With the proliferation of smartphones and social media, rumours spread more quickly in conflict environments, adding to uncertainty, interfering with accurate incident reporting, sound assessments of the severity of attacks and judgements about appropriate changes to security postures that are commensurate with risks.



Field Note 16.

"When we hear a rumour of an incident, we read the INSO report. If there isn't anything about it, I call [the INSO country director] or Safety Advisor to verify it. They might not know about it, but they'll find out. So they inform our deployments and movements in the field."
INGO Country Director in Somalia

In the larger information ecosystem in conflicts, other problems arise that INSO also counters. In conflicts with a high international profile such as Syria, there can be an over-abundance of information of widely varying quality. As such, it presents a challenge to context analysis due to the need to filter out what is not accurate or relevant. In other platforms, such as Mali or CAR, where far less information is readily available, INSO's role is to generate it.

Third, and to a lesser but growing extent, INSO's narrative on safety and conflict reflects an understanding of what is most relevant to humanitarian actors, their field operations as well as their policies and practices. Less "filtering" is necessary and INSO's unique perspective enables it to generate bespoke research products.

One experienced INGO manager cited previous experience in DRC where INSO conducted a perceptions research exercise among arms-bearers to help partners understand how they and their work were being seen by those who posed safety threats²¹. Perceptions research can be invaluable for informing safety management decisions in difficult contexts, (potentially reducing vulnerability while strengthening capacities for improved situational awareness). INSO's three Regional Analysts provide a capacity for conducting such research and to this end they have compiled initial reports on Islamic State and radical groups in their respective areas of the Sahel, LCB and Syria / Iraq. It is not clear

²¹ INSO, Mar 2014.

why perceptions research is not routinely pursued in all INSO platforms as a standard, periodic research product, particularly as the fortunes of arms-bearers and their control over territory change over time. Interviewees in Afghanistan and Somalia could not recall when perceptions research was last done in those contexts. Other INSO partners expressed the need for other thematic products from INSO, such as an in-depth analysis of cattle-raiding as a proxy for political conflict in South Sudan and a similar analysis of the humanitarian safety implications of the cantonment process there. In another context, the wish was expressed for INSO to track and report on military civil-affairs activity among the civilian population due to the perceived potential for a blurring of the lines between military and civilian humanitarian roles. And in Afghanistan, an interlocutor suggested that INSO should compile an analysis of the troubled politics of immunization, an issue that has persisted for a decade. INSO's Regional Analysts serve as a conduit for this sort of thematic research and are an existing capacity for doing more of it.

Fourth, INSO calms people down. Fear, panic and risk-aversion are quintessentially human reactions to shocks, such as attacks on aid operations and personnel. Where INSO is present, it has helped to professionalise institutional reactions to shocks by providing specialised teams, structures and procedures whose purpose is to make sense of life-threatening events and threats to humanitarian programmes, often in the heat of the moment. Examples of this impact were widespread at both operational and structural levels, in day-to-day activities and in cases (such as in the HAG example from Afghanistan) with far more structural implications.

Real-time alerts and updates, followed by more thorough reports, and eventually by in-depth analysis, help to avert panic and over-reaction among humanitarian actors by providing solid information on which to make sound safety and programming decisions.



Field Note 17.

Two INGOs had teams en route to an area when the road they were on was blocked some kilometres ahead by an armed group. INSO knew of their travel and notified them immediately. The teams turned around, thus avoiding the likelihood of a violent incident or abduction.

Even in platforms where INSO's alerts are criticised for arriving too late after-the-fact, there is an abundance of respect among members and others for INSO's ability to take a step back from the immediacy of a situation, collect the facts and conduct verified, causal analysis. It is on this basis that sound advice can then be issued to help mitigate risk while averting undue changes in security postures or other over-reactions.

The net result of the INSO narrative is that NGO safety managers, programme officers, country directors, headquarters staff and

donors save time, reduce error, make better judgements and avoid under-and-over-reactions by basing decisions on better information than would be available if INSO were not present.



Field Note 18.

"We don't have an office in Kismayo or Jubaland, but INSO does. We go there for our programmes, and it's compulsory for our staff to check with INSO before moving. We get nothing from UNDSS or anyone else, and INSO doesn't tell us things they don't know. Their information is reliable and detailed. We also use INSO monthly reports to keep our headquarters informed about where we work and where we want to work."
Somalia country director of a mines action INGO

4.5 Impacts achieved through INSO as buffer and common front

The review affirms that INSO reduces the exposure of individual member NGOs to various difficulties, and reduces their administrative and other burdens, by acting on its members' behalf as an intermediary or buffer with authorities, combatants, donors and the UN system. This happens in at least five ways.

First, in several of the platforms covered by the Review, INSO acts in a representative and / or reporting role in multiple meetings with UNDSS, the SLT, CMCoord officials, access working groups, various authorities and military actors on behalf and at the request of INSO members. This not only saves the time of individual INSO members – who, as a result, can stay more focused on their humanitarian missions – but also saves the time of the other sets of actors who can deal with one organisation (INSO) instead of multiple NGOs. As a result, there is less possibility of these other actors becoming frustrated by having to deal with multiple requests from multiple INGOs / NGOs. Several examples emerged during the Review of INSO playing an advocacy and problem-solving role with various actors in response to requests from the NGO community.

In northeast Nigeria, movement protocols imposed by the military required many NGOs to deal individually with the army for routine movement permissions. This led to increasing annoyance on the part of the military toward the humanitarian community, until a much simpler INSO-facilitated process replaced it such that INSO collects movement requests from its members and submits them itself to the military. INSO's impact has been indicated by greater cooperation from the military. Also in Nigeria, INSO facilitated agreement on a protocol with the military for the movement of ambulances through checkpoints, facilitating the free passage of patients in need of acute care. Other administrative constraints on access (visa, movement difficulties) were similarly reduced with INSO intercession at the request and on behalf of members.

Second, in contexts where it is considered problematic for independent humanitarian agencies to be seen engaging with authorities or entering UN or combatant facilities, INSO removes that risk by engaging or attending in their stead. Staff from INSO's Syria platform, for example, have visited the headquarters of Coalition Forces in Baghdad to work out evacuation plans on behalf of humanitarian NGOs active in Syria.

Third, where INSO acts as its members' representative on issues of contention with external authorities, there is less chance of backlash or other negative outcomes against individual NGOs seeking redress by themselves. In Somaliland, INSO has been asked consistently by its members to speak on their behalf in discussions and negotiations with the Special Police Unit (SPU) that is provided by authorities in Somaliland to furnish compulsory armed police escorts for aid agencies venturing outside of Hargeisa. Several INGOs mentioned the value of this INSO role as a buffer between themselves and potentially difficult authorities, saying that it saved senior managers considerable time and helped them to avoid being singled out for bribes or adversarial treatment. Moreover, the information provided by the SPU to INSO has proved to be more accurate and more accessible to INSO than that provided piecemeal by the SPU to individual INGOs, with the SPU being ultimately more amenable to resolving disputes through INSO than with individual INGOs. Some INGOs credited INSO with saving them money because SPU charges for services were reduced as a result of negotiations held on their behalf by INSO.

Fourth, although INSO is of course beholden to its own donors, it does not bear the same risk of falling out of favour with donors when it raises issues of concern with them on members' behalf. 'Donors', in this case, also includes the UN when dealing with its partners. INSO usually has no competitors and can thus speak more freely than operational INGOs and local NGOs, who may feel the need to self-censor for fear of losing donor or UN support to other agencies. Given the historically greater reticence of local, (and especially nascent), NGOs to speak up and raise difficult issues for fear of jeopardising funding, INSO's role in this regard is likely to become even more important as the trend toward localisation continues apace.

Fifth, INSO works with other NGO coordination fora on behalf of their respective memberships, such that each reinforces the messaging of the other when needs arise to seek redress on a common problem with safety implications. This was recently the case in Nigeria during joint attempts between INSO and the NGO Forum to come to terms with the UN on evacuation protocols and security assessment visits.

There are limits to what INSO can and should offer as a common service. Several INGO staff interviewed for the Review expressed the wish that INSO should open dialogue and negotiate humanitarian access and other exceptionally sensitive things on their behalf with combatants. While in some narrow circumstances this might make sense for some of the reasons above, as one INSO manager put it, "What if we open the door and no-one goes in? There is risk involved in doing this for others: it depends on the

quality of the work being done." A safer route more consistent with INSO's role would be for INSO to generate analysis and specialised training for INGO / NGO members that would inform such negotiations, if there is an expressed desire for it.

4.6 Impacts achieved through INSO as topical authority and institutional memory

The humanitarian apparatus generally has a short memory, a function of capricious decision-making under acute time pressures, worsened by the rapid turnover of aid staff and a corresponding propensity to treat every humanitarian response and every attack on aid workers as though they were entirely unique and unprecedented. The quality of humanitarian safety and programming decisions suffers when important lessons are not learned from experience or are forgotten. INSO helps to counteract these tendencies in several ways.

INSO platforms maintain databases containing verified information about safety and conflict incidents dating back to the inception of the platform. Part of every INSO platform's job is to consult and analyse that data for trends and patterns in order to inform judgements about whether safety and access challenges are getting better or worse over time or are changing in character. INSO's new Conflict and Humanitarian Data Centre (CHDC) tool promises to provide a greater range and granularity of insights once it is fully deployed. The CHDC contains the potential for deriving more generalisable findings when data from individual platforms is added into a global mix.

Established INSO platforms are also repositories for vast amounts of qualitative context analysis over time, and are thus able to provide the historical background necessary for determining whether new events, attitudes and behaviours (among arms-bearers and authorities, for example), are consistent with general trends or if they are departures from the norm.

INSO's human resources play a key role here. Country Directors, Deputy Directors, Safety Advisors and Deputy Safety Advisors, as well as senior management in the OSO, tend to be both experienced and long-serving and are well-equipped as a result to help other less-experienced actors put things in their proper perspective. Steps taken to formalise INSO's own learning from the experience of its staff will help to further ensure that such learning is not lost when people move on. Moreover, as a dedicated context analysis entity, INSO's means to play this role are more durable than those of others. INSO's Chief Analyst points out that the monitoring missions in Kenya and Ukraine were partly conceived for this purpose. Although conflict intensity may have dropped, funding declined and presence decreased, INSO has kept its incident tracking going with the understanding that contexts are cyclical and volatile: datasets and trends will be ready in preparation for the next crisis if one occurs.



Field Note 19.

"INSO helps us meet the risk-analysis needs of our donors. They are usually present in all donor meetings we have [where risk management is discussed]." INGO representative in Kabul

4.7 Impacts achieved through INSO as technical resource and skills developer

INSO adds value to humanitarian responses, and specifically to the safety of humanitarian staff and programmes, by providing contextually relevant training that is informed by experience and best practices worldwide. By all accounts, INSO trainings are of high quality and the demand for them exceeds supply in several contexts. Trainings are provided by INSO at no cost, enabling lower-budget INGOs and local NGOs to equip their staffs with adequate know-how for working in difficult environments.

INSO trainings have equipped INGO and NGO aid workers with contextually-relevant and practical skill-sets that have enabled staff to avoid volatile situations, assess security environments with a higher degree of reliability, extract themselves from potentially deadly incidents, manage critical incidents more effectively and minimise disruption of humanitarian programmes.

As an indication of demand for INSO trainings, in Nigeria there is a waiting list of approximately 100 persons for the Basic Safety Management (BSM) training and 150 persons for HEIST. INSO prioritises staff from high-risk, deep field locations or programmes. These people then go back to their teams and impart knowledge to their colleagues. Most trainers have experience in the places where their trainees are working. In 2018/19 the LCB platform has delivered 11 HEIST, 6 HEFAT, 6 BSM, 4 Advanced Security Management (ASM) and 4 Crisis Management trainings. There have been requests for Guard Management training, but the LCB platform wants to conduct a needs assessment first because most partners in the context evidently employ private guard contractors.



Field Note 20.

"INGOs aren't deploying their best people to [this context]. INSO training helps fill that gap." Manager with INGO.

An INGO active in northeast Nigeria observed that the checkpoint behaviour of its local staff improved as a result of HEIST trainings. They experienced fewer delays, fewer tense confrontations with armed soldiers and less

stress. Staff reporting on checkpoint conditions also improved. Vulnerabilities were decreased, capacities for dealing with tense situations were increased.

LWF in South Sudan has sent around 20 staff for first aid and HEIST training. An LWF driver attended an INSO HEIST training. Sometime later he took a wrong turn at Juba airport and ended up at a police checkpoint where he shouldn't have been. He talked his way out of it using some of the skills he picked up in the INSO training. It wasn't a major incident, but it did have the real-time impact of allowing the driver to emerge from the occurrence unscathed, and without experiencing major stress.

Tearfund South Sudan has sent 19 people to trainings, including 10 to safety training, 2 to first-aid, 7 to fire. According to Tearfund's staff welfare manager, the training completely transformed fire preparedness in their compound, reducing a vulnerability.

Première Urgence Internationale (PUI) in South Sudan had procured new VHF radios for its staff. INSO tailor-made a radio operator training for PUI.

Grand Bargain Commitments regarding localisation and the need to equip local NGOs and staff with adequate safety skill sets underscore the need for safety training to be elevated as a higher priority in the eyes of donors. In addition, given adequate resources, much more could be done proactively by INSO to use training strategically to influence safety practice and safety management. Training can be used creatively as an innocuous means of influencing behaviour around sensitive subjects such as 'self-generated risks', when other means would put people and organisations on the defensive.

4.8 Conclusion

To conclude, **evidence gathered during the review demonstrates the varied, positive impacts that INSO has on the day-to-day operations of its members and which result from its diverse roles and the range of products and services that it provides.** Options for INSO to extend and strengthen these impacts are explored in the following section.

INSO incident data and analysis have informed strategic decisions taken by senior management of operational humanitarian agencies, particularly in assessing accessibility of geographic areas in places of acute need.

5 PART III: OPTIMISING IMPACT



Field Note 21.

"It's not easy to be INSO." MSF Country Director

At the global level there is an abundance of actors shaping humanitarian safety policy and practice in different ways.

Among NGOs, these include mainly headquarters-level fora such as the European Interagency Security Forum (EISF), InterAction and the International Council of Voluntary Agencies (ICVA). Many of the largest humanitarian INGOs pursue various awareness, research and advocacy efforts by themselves, (e.g., MSF's CRASH), or in collaboration with others. The UN Department for Safety and Security (UNDSS) and UN line agencies make their policy presence felt at field level through the UN's efforts to keep its own people safe, or as de facto donor agencies working through INGO partners to implement UN humanitarian programmes. At the highest level, and formalised by UN General Assembly Resolution 46/182, the Inter-Agency Standing Committee (IASC) serves as the primary coordinating body for UN and non-UN actors in humanitarian response. Among donors, the Good Humanitarian Donorship Initiative provides common guidance on principles and practices when responding to humanitarian crises.

Apart from major technological advances that enable more effective communications and incident tracking and analysis, in the past two decades there have been only two major developments towards the institutionalisation of more effective safety coordination at field level. Of these, the Saving Lives Together (SLT) Framework emerged under IASC auspices as a top-down policy effort to improve field-level coordination practice by providing guidance for the UN system, INGOs and IOs in their interactions with one another on safety issues (see below). The only other major development at field level has been the emergence of INSO as a bottom-up and increasingly global common service and field coordination platform provider.

As noted earlier, evidence is suggestive of INSO's growing impacts on the structure of safety coordination. Following the launch of INSO as an independent INGO in 2011, it has been responsible for starting all new safety platforms since then, with the exception of the Safety and Security Committee for Lebanon (SSCL), which began in about 2015 as a hosted platform under Danish Refugee Council but did not endure. Strong uptake of the INSO model across many diverse contexts is another indication of its structural impact.

This has been happening organically. One of the drivers behind INSO's rapid growth has been the demand for INSO's products and services at field level among aid workers who have experienced INSO elsewhere and recognise its added value to their work. A UNICEF humanitarian access officer with experience of INSO in Nigeria looked for INSO when he arrived in South Sudan. Likewise, the ICRC Head of Delegation in South Sudan had experience with INSO elsewhere, found its analysis good and accurate, and asked his safety manager to enter into a partner relationship with the INSO platform in Juba. A Tearfund manager in South Sudan related that he got his 'first good briefing' in Kabul from ANSO ten years ago and encountered them again in Syria. Yet another individual working at an INGO headquarters in Europe was concerned about not being able to offer a new local partner in South Sudan some needed safety training. The headquarters staffer knew that INSO was now present in Juba and suggested INSO membership to the local partner.

Some long-serving INSO staff expressed the view that the generations of aid workers they have engaged with since the inception of ANSO in 2002 will influence higher-level conversations on safety policy and refinement of practice such that INSO presence in new crises, for example, would eventually be regarded as a necessity. The South Sudan example illustrates that INSO is seen as filling important gaps in locales where other forms of safety coordination exist but lack the capacity or inclination to provide the same granular coverage that INSO is built to offer. INSO recently took the initiative to convene a safety coordination meeting in Yei, leading to improved access through representations to authorities and, as a result, there has been expressed desire from partners for INSO to scale up its field presence and serve as a focal point on security wherever the UN has a presence, including in Yei, Wau, Rumbek and Akobo.

The review heard several examples of INSO platforms entering into ad hoc collaborations with other coordinating bodies, strong evidence of the degree of INSO's acceptance and influence across several contexts. In Nigeria, INSO and the NGO Forum routinely reinforce one another's messages when interacting with the UN Humanitarian Country Team and Nigerian authorities. In northern Syria, INSO collaborates with OCHA on an Access Working Group (AWG). The group has mainly been a forum for sharing experiences in an environment where, by the accounts of those interviewed, access constraints tend to be massively under-reported. They also developed a methodology for mapping and measuring access. Among nine identified access constraints, the AWG resolved three, mainly of a bureaucratic / administrative nature. An access map that OCHA wanted to generate was rejected by INSO out of concern that it would not adequately portray the very granular information that needed to be conveyed. Similarly, OCHA wanted to produce a mapping of local councils in the north, but this was rejected on the grounds that it could jeopardise humanitarian presence due to real or perceived affiliations of some council

members with proscribed groups. There is interest from OCHA Syria in formalising its relationship with INSO even more, though this would raise difficult questions of humanitarian principle in a highly charged and politicised aid response. Also, the North-East Syria Forum cooperates closely with INSO on scenario planning. INSO has a standing invitation to provide safety updates to monthly Team Leader meetings hosted by the Forum. All of these formalised interactions constitute evidence of INSO's acceptance at platform level and its growing impact on safety coordination architecture.

5.1 Contextual / Structural advantages and challenges

INSO's various successful deployments so far in a wide variety of contexts are indicative of the organisation's adaptability. INSO senior management accurately asserts that INSO has revolutionised the field safety coordination architecture: the evidence shows that the advent of INSO has enabled the relatively rapid establishment of effective safety platforms that are valued highly in many diverse contexts. Rapid rollouts of new platforms are enabled by a standardised structure, products and services. Standardisation between INSO platforms adds value because it makes it easier for new platforms to become fully operational more quickly due to a growing familiarity with INSO among INGOs globally: when INSO arrives on the scene, INGO staff who have experience with INSO elsewhere gravitate towards a new platform, are aware of its products and services, and know what they can expect from it.

However, as part of the humanitarian apparatus in conflict areas, a safety platform is as subject as other entities to the centrifugal forces that, not uncommonly, result in fragmentation of an aid response that mirrors the fragmentation of a war environment. As such, INSO's achievable impacts are likely to be limited as adaptations and re-adaptations become necessary as conflict, safety conditions and the operating environment for aid actors transform over time.

A full-on military conflict between opposing forces, as in Afghanistan, generates a set of safety challenges eliciting a particular programmatic response from INSO. While their intensity has varied considerably since 2001, the nature of the challenges there have remained relatively unchanged. During interviews, aid workers speculated over how these challenges would change if the Taliban regained political control of the country, potentially ushering in a vastly different operating environment as well as changes to humanitarian need itself. Programming would have to be adjusted accordingly, with implications for the safety environment. Likewise, what would be the implications for INSO's own presence, or for its activity, if it were permitted to remain

under the Taliban? Whether these are valid concerns or not, the questions are being asked.



Field Note 22.

"What is the NGO community expecting from INSO regarding an increased intensity of conflict, elections, a ceasefire, and negative perceptions of the US and UN? Everyone is talking about 'Stay and Deliver', but what about upcoming instability? What do we need to do to ensure that we can be here in 3 years and not in a bunker?" **Donor representative in Kabul**

In other conflicts, Syria among them, certain access and safety constraints have accrued from open warfare and decreased for a time once territory changed hands. These were replaced after a brief 'honeymoon period' by other onerous constraints associated with asymmetric warfare and the introduction of new administrative and bureaucratic controls. At best, such a situation requires adaptation and a re-calibration of products and services to new needs. INSO's reliance on its networks of Field Monitors, for example, is more robust in some contexts than others. Networks tend to go dark when an area changes hands and need to be refreshed or rebuilt when that happens. Alternately it can be judged too dangerous to re-establish a network, at which point it becomes necessary to re-orient programming in a different direction – or, ultimately, to disengage because of declining relevance²².



Field Note 23.

"In Syria, INSO helped us figure out if we could remain operational if an area we were working in fell to government forces." **Medium-sized INGO manager in Amman**

INSO's vulnerabilities to context - shared by others in the humanitarian apparatus and largely beyond INSO's abilities to reduce - limit INSO's scope and scale of global activity and thus its potential impacts. INSO's office in Gaza was forced to close by host authorities and its monitoring mission in Ukraine is constrained in its coverage on one side of the conflict. In the absence of a major change in Russian attitudes towards INGOs, it is difficult to envisage an INSO platform of any sort in the Russian North Caucasus should a humanitarian crisis emerge there once again. Similarly, while efforts to do so continue, attempts to establish a platform in Yemen have so far come to nought, partly

²² Interlocutors pointed out during the Review that UNDSS faces a similar challenge to its relevance in some locales, with visibility of the safety situation only or primarily from government-controlled parts of a country and limited or no presence outside these areas. Accordingly, the accuracy and salience of the information available to UNDSS becomes questionable: as a result, so does the information available from UNDSS.

due to the unwillingness of the prevailing authorities to receive one, and partly because of the political sensitivities accruing from the location of INSO's OSO in the United Arab Emirates, a party to the conflict.

INSO can strive to maintain as nimble and light a footprint as possible in order to be resilient and readily adaptive to different environments. But given INSO's adherence to humanitarian principles, there are limits, and the limits counsel caution in the way that INSO manages expectations within the humanitarian apparatus and among donors.

What is clear from the evidence however is that an important part of the dynamic of an INSO presence is the NGO community's heavy reliance on INSO in many settings. Given this reliance, and provided that an environment is not untenable for INSO's usual constituency of members, INSO senior management points out that in such situations the aid apparatus has come to INSO's defence when needed because INSO adds value and NGOs have facilitated every INSO entry where a safety platform has been lacking. In other words, INSO's acceptance and durability is partly a function of the demand for it, as well as of the space for it. Unless INGOs and NGOs have ceded independence, or their own presence is tenuous and under pressure for other reasons, or they lack leverage with authorities sufficient to enable INSO's presence, the evidence from INSO's existing platforms so far suggests that it can probably find a way to be present and play an impactful role.

5.2 Capacities and competencies: INSO's organisational culture, people and impacts

From the perspective of an outsider looking in, INSO's organisational culture appears dominated by the following:

- a sharp focus on the operational safety needs of its members, and a corresponding emphasis on delivering high-quality programming that is consistent with humanitarian principles, as reflected in INSO's "Accountable Humanitarian Professional" statement;
- self-identification as, and emphasis on being, action-oriented, and an NGO first, a security entity second;
- a "nose-to-the-grindstone" mindset among both platform staff and senior management, many of whom work in stressful, fast-paced environments, many in active war zones with acute insecurity and pressing humanitarian need, often with heavy workloads and demands for on-request services, and with many recurring deadlines for the generation of scheduled INSO products and services in timely fashion;
- a pronounced focus on the "field", and a felt need to "tune out the noise" of what is happening at other levels or among other sets of actors involved with humanitarian safety issues;

- at times, disdain among a relatively small but still notable number of staff toward policy and practice work occurring outside of INSO circles, e.g., "We know best because we are in the field."

This organisational culture serves INSO and its membership well, to a point. The almost uniformly positive appraisals that INSO receives from its members at field level attest to this. Staff can be justifiably proud of what has been accomplished, and they are. But INSO's engagement with the humanitarian community in the field is not yet complemented or backstopped by a similar capacity to engage with safety policy and practice discussions at the global level. Beyond the field platform level, interviews conducted for the review revealed with consistency that INSO is perceived as insular at the global level: inward, rather than outward-looking. This is perhaps unsurprising considering that until very recently, INSO had no global personnel or office at the HQ level through which to engage with such actors, whose own exposure to INSO in the field may be limited and thus prone to misperception.

INSO's engagement with the humanitarian community in the field is not yet complemented or backstopped by a similar capacity to engage [...] at the global level.

While global engagement has been envisioned as part of INSO's structure from the outset and was explicitly listed in the concept note of 2009 and launch document of 2011, senior management acknowledges the prioritisation of establishing both a strong organisational foundation globally, and sound, well-functioning individual country platforms. The wisdom of that approach is validated by INSO's rapid and successful rollout of ten platforms and two monitoring missions. Amid the resounding successes of its platforms though, INSO until now has had a relatively low profile beyond them. This comes at a cost to INSO's impact. As elsewhere in humanitarian operations - where adopting a low-profile presence can lead to misperceptions and lack of acceptance - so has INSO paid a price for its nose to the grindstone, determinably field-focused ethos. It has not yet consistently sought a voice or found its place in global policy circles or in the humanitarian safety community of practice. As such, it is missing opportunities for making important - and potentially revolutionary - contributions to aid worker safety and improved humanitarian responses in conflict.

Several donor representatives, senior INSO staff and others felt that INSO could and should engage more proactively with other prominent organisations dedicated to humanitarian safety. EISF itself was not consulted for this review, but it would seem to be a natural, synergistic pairing for INSO in which to foster better policy and improved practice. Beyond that, INSO's voice should be heard and its knowledge brought to bear, when needed, wherever decisions are made that affect the safety of humanitarian workers in the field. As a primarily field-focused organisation, INSO has eminently valid and pertinent observations and analysis to inform

discussions of support for localisation, questions of resource allocation for safety initiatives more broadly, and steps that might be taken to further enhance policy and practice safeguards for aid workers most generally.

Opportunities for stronger global impacts are likely to emerge as INSO further develops and rolls out its global products and makes these accessible to the broader constituency out of which global safety policies emerge, and where lessons learned and safety practices are refined across contexts. The addition of a Chief Analyst role, the CHDC and INSO's existing global products are important steps in this direction, and the organisation already has an International Advisory Board that can contribute to the global outlook. INSO may be freer at the global level than at the often-busy platform level to pursue other options for expanding its impacts. If adequately resourced, it can work in concert with other actors working at other levels. It can perform a collegial ground-truthing role. It can even serve as a healthy disruptor that challenges, when necessary and useful, conventional wisdoms and prevailing myths. In any case, INSO's immense but latent potential at the global level lies both in its people and in the granular knowledge it holds by virtue of its sustained field presence in insecure settings.

Shifting the focus back to field level, there is a degree of inconsistency in the awareness that INSO country platform staff have of the pressing policy and practice discussions around aid worker safety, the ways those discussions trickle down to affect humanitarian staff in the field, and the larger questions of access and effective humanitarian response. To whatever extent this inconsistency is a constraint, it can be remedied easily enough through modelling and mentoring by senior management and, more systematically, through professional development training, internal information products, ample internal discussion and suggested reading lists. The recent addition of an Operations Director, and steps being taken to build a Human Resources team, are positive movements in this direction.

INSO staff have disparate profiles that are generally clustered around three professions: humanitarian, security / military and analytical. There are ample cases of staff with experience in two clusters of experience and some benefit from experience in all three areas. Others joined INSO with experience in only one of these professions but grew into the job, showing a facility for learning as they go.

A minority of INSO staff tend to maintain a largely security / military or humanitarian worldview, limiting their ability to see problems through a different set of lenses. Occasionally, the resulting biases are evident in oblique comments such as descriptions of INGO programming staff as the “rainbows and unicorns crowd”, or “muscle heads” in referring to people from a security background. In general though, INSO staffing has avoided the tendency that can be apparent among safety and security professionals to see safety as an end in itself rather than a means of enabling effective humanitarian work. Likewise, it has avoided an “assist and protect at all costs” mindset that would only put people at undue risk.

While steps are now being taken to fill the gap, INSO's attention to human resources has suffered somewhat due to HR staff turnover at the OSO. One consequence of this has been a lack of investment in formalising an approach to recruitment and a systematic identification of core competencies. The earlier observation that much of INSO's potential lies in its staff is not a mere bromide.

By all accounts among those interviewed, platform staff tend for the most part to be professional, responsive, dedicated and bright. In one discussion observed during the review – striking for its sweep and insight and memorable for its collegiality – a DSA and SA together analysed the potential implications for conflict and NGO safety of new mineral extraction activity in an unstable area of Afghanistan. The discussion ranged from granular analysis of who stood to gain and lose locally, to the mining activity's place in recent geopolitical developments, to the anticipated effects on local inter-communal tensions and power structures. It struck the outside observer as an excellent example of the synergy that can develop when international and local staff combine their knowledge and brainpower for an analytical purpose. That does not happen by accident. To its immense credit, INSO provided the space for that to occur.

INSO staff are also, often, extremely busy:



Field Note 24.

“I could double myself and still not have enough time to do everything I should be doing! And I'd like to do more substantive reporting and more analysis, but I'm always under tight deadlines. I always have a lot of NGOs on the ground expecting quick answers, so it's difficult. But I'm surprised at how well it works, despite the difficulties.”
INSO Safety Advisor in active conflict area

Optimising INSO's impacts requires greater consistency in the level of knowledge among INSO staff about the humanitarian apparatus and its safety challenges: at present this varies rather widely. INSO managers, many of whom described growing into their job over many years and several different platforms, pointed out during interviews that INSO was, in effect, creating a new profession or discipline of highly specialised analyst. The necessary competencies of this new profession include clear-eyed analytical qualities, an affinity with the humanitarian ethos, the political acuity and attention-to-detail of a first-rate safety manager, curiosity and professional demeanour. If there is such a thing as the consummate INSO professional, it is someone who balances intimate knowledge of context with a strong grasp of broader analytical tools, the state-of-the-art of humanitarian practice and the safety and other challenges that aid agency staff, donors, and other parts of the response system engage within their work.

There is probably no aspect of a humanitarian response to conflict that does not in some way overlap or bear upon humanitarian safety. As a specialist humanitarian INGO serving other humanitarian NGOs, all INSO staff should be actively encouraged to flesh out their understanding of the issues that are relevant to the effective functioning of humanitarian responses in difficult places: they need to know their clients and how they work. Mentoring of new staff tends to be focused mainly on programme management skills and the analytical component of what INSO does, sometimes leaving knowledge gaps where the intricacies of humanitarian action are concerned. In addition to the mentoring that occurs within platforms - and between platforms and Regional Directors - there are several ways, at varying levels of expense, that INSO could attend to this.

A more formal process of 'onboarding' is one way. A programme of self-study and required reading might be another. Periodic professional-development workshops could be a particularly rich device if staff were brought in from different platforms and given opportunities to learn from one-another's experience. A 'Humanitarian Policy, Principles, and Practice' workshop or series of trainings for CDs, DDs, SAs and DSAs could help INSO achieve the consistency in understanding among staff that would enable INSO to optimise its impacts on safety policy and practice, locally and globally. This is meant as a proactive step, not a reactive one. While gaps were mostly relatively minor, to the extent they exist the following content could be useful:

- The scope of need and humanitarian action (assistance and protection)
- Legal framework for, and rights-based approaches to, humanitarian action
- Elements of the humanitarian apparatus, their pros and cons: UN Agencies, INGOs, NGOs, (solidarity / Dunantist / faith-based / multi-mandate Wilsonian / service providers / contractors etc.), coordination bodies (local and international e.g., InterAction, ICVA, IASC, etc.), donors, research bodies
- Basic humanitarian programming toolkit: SPHERE, Conflict Sensitivity, Protection, Gender
- Humanitarian principles and the threats to them
- Current trends and shifts: localisation, Grand Bargain, etc.
- Acceptance, protection, deterrence
- Proximity, pros and cons of low vs. high profile, light vs. heavy footprints
- Prevailing approaches to humanitarian safety, history, major developments affecting policy, practice and thinking around humanitarian safety

- Perceptions – among beneficiaries, arms-bearers, other actors
- Civil-Military Coordination (CMCoord) and military civil-affairs activity
- Relationship between aid worker safety and programming quality
- The global safety environment – major trends in state / non-state actor behaviour, safety postures, safety spending, risk tolerance, risk transfer, duty of care, liability, etc.

5.3 Conflict and Humanitarian Data Centre (CHDC): Implications for structural impacts

"Presence and Proximity" highlighted the need for humanitarian actors to review data and analysis on humanitarian security and access and develop a means of filling gaps in the evidence base needed for guiding policy and practice²³. INSO is now field-testing its CHDC tool in preparation for a global rollout. It is mentioned here in advance of its launch because it is likely to have major positive implications for INSO's structural impacts, with substantial payoffs for INSO's ability to enhance humanitarian safety. The proprietary tool was demonstrated during the review visit to the Lake Chad Basin platform. It represents a major step forward for INSO's ability to store, manipulate, present and share its field-based incident data in user-friendly ways that will enable a greater range of questions to be asked of it, both by INSO itself and by INSO members and others who are given varying degrees of access.

While considerable time and resources will be needed for each INSO platform to upload its existing incident data to the CHDC, the tool will allow the capture of a broader range – hundreds - of data-points for each recorded incident. At present, INSO's existing incident databases can be consulted for limited patterns or trends, such as the numbers and severity of incidents from place-to-place, or the most likely time-of-day for attacks on aid workers in a given setting. The CHDC will permit both more granular and more sweeping analysis, with the expectation that more patterns and correlations will emerge from an enriched and more flexible incident database.

The process is ongoing to identify what new fields or data points to capture in the CHDC for each incident. The range of fields could, for example, include more specific coding for the authors of incidents, more details about the forms of aid programming being provided, as well as staff and donor profiles and the affected organisation's history of incidents. Theoretically, it could also be used to track the changes that have resulted from a single incident or platform-wide cluster of incidents (i.e. outcomes and impacts for proximity, programming and presence). Since the data from all

²³ See Jackson, A and Zyck, S (2016), Recommendation 19.

platforms will eventually be centrally contained by the CHDC, more possibilities will emerge for INSO to conduct analysis of its data at the global level.

The CHDC is likely to further standardise a higher quality of incident reporting since the process of data entry will be more automated and user-friendly than now. Given the extreme sensitivity and safety implications surrounding much of this information, INSO staff are alert to the heightened need to safeguard this data – and to be seen to be safeguarding it – and to prevent its use for nefarious purposes. INSO's plan is to allow different levels of access for different actors, with only INSO having full access, and different gradations of access for INSO members, selected other agencies, academics and the public. Consistent with INSO's commitments to confidentiality, the CHDC has been designed and built to allow for more manipulation of data by signed-in members, while ensuring that sensitive member-specific data and the products generated from it are only accessible to the member. For all others, certain information would be inaccessible or anonymised. Some donor representatives queried the relevance to humanitarian work of the CHDC's scope, underscoring the need for INSO to communicate clearly how its data will be used and what safeguards will be put in place.

Many larger INSO members already incorporate INSO's raw incident data into their own systems of trend and context analysis. Once it is fully operational, the new tool – to be provided by INSO as a common service – seems likely to further level the playing field between the analytical capacities, and thus the risk management burdens, of larger and smaller INGOs / NGOs. Smaller operators for whom a costly and sophisticated data management tool would otherwise be out of reach will be able to use the CHDC. They will also have access to a much larger dataset that goes well beyond what it is currently possible for them to collect even from their own immediate operational environments and limited fields of view.

For CHDC users, the range of possibilities for manipulating data and generating purpose-built products will theoretically allow a broader range of questions to be put to INSO's incident data. With creative use, possibilities are likely to emerge for more accurate and more detailed mapping of humanitarian access. Likewise, the CHDC may yield new insights about incident causality.

A clear understanding of causation is of course fundamental to anticipating future scenarios and, ultimately, to incident prevention and safer humanitarian work. For INSO itself, the CHDC should eventually provide an enriched evidence base in which to detect patterns in incidents, look for correlations and aid in the analysis of causation in potentially ground-breaking ways such that safety dilemmas worldwide can be addressed in a more informed and systematic way.

Finally, some INSO members and others already use INSO's conflict incident data to anticipate, or triangulate information on, likely humanitarian fallout from various forms of military activity – effectively creating a humanitarian overlay to a mapping of incidents. The evidence of this encountered during the review was

limited, but it does illustrate that INSO partners are using INSO's conflict reporting in creative ways with potentially positive downstream effects for the quality and timeliness of humanitarian responses.

The logic here is that much is known about the likely humanitarian implications, for example, of using various kinds of heavy weapons in urban areas (i.e. aerial bombardment has the predictable result of destroyed and damaged housing and infrastructure, causing displacement and its ensuing deprivations). More rigorous checkpoints can often be anticipated to cause disruptions in the movements of people and goods. With the greater level of detail and flexibility offered by the CHDC, such an application of INSO's field-based data may eventually yield important impacts for humanitarian preparedness and the timeliness, targeting and propriety of responses.



Field Note 25.

"INSO has a set of data from which more can be derived. When you map incidents over time, you should be able to develop an overlay showing the likely humanitarian consequences of [some kinds of] security incidents. In the East the extensive network you have yields a granularity of information that can be very suggestive of humanitarian implications. [The humanitarian community] ...is not very good at mounting multi-sectoral fact-finding visits." Donor representative in Kabul

Where other reliable sources of conflict incidents are not available, this may be a useful purpose for INSO to explore further. The Afghanistan platform may be most ideally suited to testing a greater emphasis on flagging conflict incident data for anticipated humanitarian fallout due to INSO's longstanding presence and the scope and scale of military activity there. Specifically, INSO conflict incident data could be scrutinised for the effects of different types on conflict activity on the movement of people, goods and commerce.

The CHDC should eventually provide an enriched evidence base in which to detect patterns in incidents, look for correlations and aid in the analysis of causation in potentially ground-breaking ways.

5.4 Other limitations and opportunities

The following additional factors emerged with consistency during interviews both as constraints on INSO's impacts and as opportunities to be pursued.

5.4.1 Willingness to share information

INSO platforms uniformly displayed clear efforts during the review to ensure that members and partners felt confident about sharing safety related information with INSO and with one another.



Field Note 26.

*"There is a tendency to downplay the seriousness of the security situation. INSO creates an environment where there is a safe space to bring incidents forward." **Donor Representative in Kabul***

Despite these efforts, staff and partners in all platforms also identified internal and external factors that continued to impair information sharing.



Field Notes 27.

*"Even within the largest INGOs there is still at times a reluctance among junior staff to share information about an incident with their managers, for fear of being known to have 'screwed up.'" **INGO manager***

In Afghanistan, competition between INGOs over funding was cited candidly as a reason for reticence. An INGO country representative in Syria, while reflecting both on spending pressures and competition, also noted that donor culture was discouraging NGOs from being up-front about challenges, failures and security incidents. His view was expanded upon by an INSO Safety Advisor familiar with the situation:



Field Note 28.

"In Syria there has tended to be an under-reporting of safety incidents involving NGOs, who have been pressured by donors or their partners to scale up activity and spend. At the same time, increased donor concerns, oversight and restrictions on aid falling into the hands of proscribed groups has had a chilling effect on the willingness to share information. And in general, access officers tend to be very guarded about where their

*agencies have successfully opened access for fear of others threatening it by poor performance or bad behaviour." **INSO Safety Advisor***

The attendance at INSO Safety Roundtables was excellent in all the visited platforms. These were held in English, and participation varied, with some comprised almost wholly of local staff, and others with a mix of international and local staff. In all cases, there was a good mix of large, medium and small INGOs and local NGOs. Active participation was limited in the roundtables where it was mostly local staff in attendance. It was noticed that local staff and local NGO representatives had long conversations among themselves in their own languages following the close of the roundtables: active participation during the meetings is probably not the best indication of their usefulness.

INSO members are required by their code of conduct to share basic details of safety incidents without undue delay. The transactional feature of information sharing was raised in several interviews as a dynamic that also encouraged willingness to share:



Field Note 29.

*An **INSO Safety Advisor** observed that when a member asks for an area assessment, INSO asks for subsequent feedback from the member if it visits the area. Some members are more forthcoming with information if the relationship is transactional – with INSO and with others.*

*Another **INSO Safety Advisor** (SA) said candidly that his Deputy (DSA) had better relationships and a more reciprocal exchange of information with INGO local staff and local NGOs than the SA had with expatriate staff. He attributed this to what he called a 'transactional relationship' in which local staff knew that INSO would be there for them if they experienced problems.*

There is a risk of dependency: an INSO Safety Advisor noted that there was a need to be clear with members about INSO's limitations, and that it was there to help *inform* NGO decisions, not make those decisions. Still, he described a transactional relationship between INSO and its partners:



Field Note 30.

"Sometimes NGOs want to be spoon-fed information – things like hotel assessments. Ok, but sometimes NGO safety advisors are getting INSO to do their job for them. We put up with it because they also give us a lot of information back. But there's a fine line between giving

out information and making decisions for an NGO.”
Safety Advisor in Somalia

INSO’s training efforts were cited several times for their effects in promoting an improved culture of information sharing in different ways. In South Sudan, Tearfund reported that since it sent its staff to INSO safety trainings, they have shown more willingness to come forward to managers to express concerns. In Nigeria, graduates of INSO trainings have created social media platforms enabling them to stay in touch after they return to their missions. In effect, they have formed their own network in which they feel comfortable discussing safety problems in their work. One INGO in Maiduguri also noted that INSO trainings have equipped staff with the ability to filter out rumours and report incidents and developments more accurately, leading to more confidence among managers to share such information more widely.

5.4.2 The lack of cross-fertilisation between platforms

At present, INSO’s platforms are siloed – that is, their experience and learning is mostly isolated and held within country platforms and between the platforms and the OSO. This is major obstacle to more and greater INSO contributions to policy and practice that are well-informed by the contents of INSO databases and the minds of its platform staff and senior management team. There is little systematic sharing between platforms of challenges, lessons-learned, or best practices beyond the finessing of INSO’s own processes, products and services. For all their unique attributes, different contexts also contain many similarities, practices and learning that can be transposed with good effect to other contexts. Platform-to-platform sharing on incident causality, risk mitigation and impacts should be factored into a MEL plan, and fostered more generally through cross-platform communications. INSO staff anticipate that the CHDC will help cultivate more cross-fertilisation between platforms by making information easier to share between them, and by enabling more comparative analysis between multiple countries through a virtual platform.

5.4.3 Too much information?

On the logic that more information will yield better decisions, INSO platforms produce a massive volume of reports and data. Among the users of INSO products, opinions are mixed as to whether INSO strikes an adequate balance between relevance and volume in the information it propagates. Several field security managers, a programme manager with a large INGO as well as an ICRC Head of Delegation expressed in interviews that the sheer volume of reports from INSO detracted from INSO’s ability to have a greater impact because readers need to sift through a large

amount of information for what is most relevant to their operations.



Field Note 31.

The director of a busy NGO forum in an active conflict area rarely reads INSO reports due to time pressures but relies heavily on Skype groups initiated by INSO.

However, the assessment of “too much information” seems highly subjective from individual to individual and context to context. Some humanitarian professionals habitually read extensively about their context, while others do not. INSO staff note that in some contexts there is an abundance of relevant reading (e.g. Afghanistan or Syria), while in others there is little (e.g. CAR or Mali). It may also be that INSO’s products come to be taken for granted after a time and their value under-rated as a result. It seems likely that information products can reach a point of diminishing returns such that their usefulness starts to decrease at a certain volume: the essential messages can get lost.

The onus is on INSO to do the analytical job of ensuring that the information products it selects to propagate are relevant and that they resonate with recipients. The periodic satisfaction surveys that platforms distribute among members yield some information about how products are valued²⁴. More precise feedback from users (and specifically from Advisory Boards) could help platforms to cull unnecessary volume, thereby economising on scarce staff time and other resources while sharpening the focus of users on the most important products and messaging.

5.4.4 INSO is not the safety police

INSO’s role is not to police aid agency behaviour, preparedness or decisions, but it does promote compliance with community standards in indirect ways. Various voluntary or opt-in instruments help to keep different aspects of humanitarian action on track in ways that directly or indirectly influence the safety landscape. As these increasingly become accepted norms in the humanitarian apparatus, it becomes clearer to all what the boundaries, expectations and standards are.

INSO, for its part, requires members to adhere to its own code of conduct, wherein members have a responsibility to share basic incident reporting with INSO in a timely way. Outside of INSO, other voluntary, opt-in instruments include UN CMCoord and country-specific guidelines delineating the circumstances under which military or civil defence assets can be used in humanitarian responses while safeguarding humanitarian principles; UN guidance on the use of armed escorts; emerging guidelines on the

²⁴ The overall satisfaction rate for INSO is 86%.

use of private security contractors, the SLT and evolving guidance on management of duty of care obligations.

Just as NGO fora often host training or awareness sessions on SPHERE Standards, gender, PRA and other guidance, where awareness gaps exist in the realm of safety-related instruments INSO has a logical role in helping to fill them. Propagation of community standards and best practices through devices such as coordination meetings, messaging, training and familiarisation sessions are effective ways to achieve greater adherence to community-wide standards even though no formal enforcement measures exist.

5.4.5 Safety and access exist in the eye of the beholder



Field Note 32.

“There is a really broad spectrum: people who can’t get out of the Afghanistan and Iraq mentality and others who take no care at all.” **Safety Manager, former INSO**

Different risk tolerance, competencies, organisational cultures and professionalism among the various elements of the humanitarian apparatus mean that perceptions of safety and security, as well as humanitarian access, vary widely between organisations. They also vary within organisations when various staff exhibit greater or lesser willingness to expose themselves to safety risks. An area considered permissive by one organisation can be considered off-limits by another for a variety of reasons. Although this is a limiting factor for INSO’s impacts that is largely beyond its control, INSO’s products and services probably mitigate the differences over time through its provision of a common narrative and making the same verified information and products available to all members and partners.

5.5 Conclusion

This section has explored some of the limitations of INSO’s impacts at the structural and operational levels and identifies ways for optimising these impacts. **These challenges will not be difficult to overcome if INSO builds on its strengths and accomplishments to date.** At the structural level, the importance and fitness for purpose of INSO’s flexible project model has been highlighted. At the global level of policy and practice, greater engagement will complement efforts at field level to further improve humanitarian safety, informed by INSO’s uniquely field-focused experience, growing global products and its impressive store of primary data on safety incidents. At the more operational level of field platforms, professional development of staff to increase the consistency of their knowledge and awareness of effective humanitarian action will further enhance impacts at that level. Ongoing monitoring and evaluation efforts will play an important role in optimising impacts at all levels. Options for MEL are reviewed in the following section.

INSO’s role is not to police aid agency behaviour, preparedness or decisions, but it does promote compliance with community standards in indirect ways.

6 PART IV: MONITORING, EVALUATION AND LEARNING

This section describes practical measures for monitoring and evaluating INSO's impacts, then explores the MEL function in a more strategic light. It has been informed – partly in hindsight – by the methodological considerations associated with impact harvesting that were explored in the introduction.

6.1 Systems and processes to capture and document impacts

The goals of capturing impacts are:

- to improve INSO practice, particularly by shedding more light on incident causality and the mechanisms through which INSO makes a difference;
- to improve safety and security practices among INSO partners, and;
- to show evidence to external (e.g. donor, policy, SLT) stakeholders of how INSO makes a difference to aid worker safety and the effectiveness of humanitarian responses.

Conversations with INSO staff and others have yielded several possibilities for capturing impacts of INSO's interventions. A common thread running through all of them is the need to flag certain INSO interventions for capture as they unfold, or at least as early as possible after the fact. This will help situate the interventions more accurately on the causal chain, without which it becomes far more difficult to attribute impacts to interventions.

Activity and service request logs, (as introduced within platforms in the last several years), were not thoroughly scrutinised during the Review, but as a first useful step several INSO CDs and DDs suggested that it would be reasonably simple to incorporate a procedure for "ticketing" of requests from members. Like the ticketing practised by many commercial customer service portals, it would entail asking for basic information about the intended use of the service or product when a request is made and feedback on any outcomes of their use after the fact. It would be particularly valuable to flag all crisis support interventions and requests for bespoke area briefs, since these services are more likely to yield rich information of the sort that enables a clearer understanding about downstream effects. Such a system would help INSO to identify and keep track of situations that merit a closer look for MEL purposes. Queries put to the new CHDC could be similarly ticketed, with basic questions being asked for MEL purposes about intended use, before a user is permitted to go further.

An even simpler suggestion was to install a 'feedback' button on INSO's website or the CHDC, perhaps as a pop-up when a user logs out. Basic questions could be posed about what INSO's information achieved for the user.

6.1.1 Case studies

Case studies of varying lengths can be particularly rich ways to capture and understand experience, specifically the roles INSO plays in various situations or with selected members, and the ensuing effects. Their specific function for INSO would be to:

- describe the safety and programming context;
- analyse the causal chains of the risk environment / safety challenges / incident(s)
- explain how decisions were made, and how INSO products and services were used;
- isolate the relevant indicators, demonstrate how outcomes and impacts were attained;
- analyse the causal chain for incidents, the safety environment in general, and INSO's impacts upon it;
- identify lessons-learned / to-be-learned;
- recommend changes for INSO / for members / for policy and practice.

There is a distinct advantage to compiling case studies more or less in real-time, as it would allow case writers to follow INSO's intercessions as they unfold, rather than trying to reconstruct events with incomplete information after the fact. There are several ways this could be approached. Platform staff could keep a brief daily log of their involvement in a situation. The log could then be mined for material and a case study compiled from it by staff after a set period or following resolution of the event. Alternately, someone external to the platform could be brought in temporarily to follow events closely for a set period, documenting the situation in a case study as it unfolds. Another potentially rich option would be for INSO to shadow a member temporarily as they made use of INSO products or services. All possibilities would of course need the approval and active participation of the member(s) involved. Several situations come to mind where case studies could yield useful results:

- the response to the Ebola outbreak in DRC;
- new platform start-ups;
- elaboration of evacuation / contingency plans or other initiatives under the SLT Framework;
- a comparative examination of experience with the SLT in several settings;
- use of INSO incident data by UN OCHA in its compilation of the Humanitarian Needs Overview for Syria, or similar applications;
- collaboration with the HAG in Afghanistan or similar situation at the onset of panic;
- crisis responses.

Certain themes that emerge across more than one INSO platforms could also be explored to good effect by comparative case studies. For example, INSO has a presence in multiple contexts where affiliates of religious extremism are present and active in ways that impair humanitarian safety and access. How are the challenges posed by such groups similar and different from context to context? What have INSO and its members learned about addressing these challenges? What works and why? What doesn't work? Why? What policies and practices have enabled safer work and greater access in such areas?

6.1.2 Compulsory feedback on impacts during membership renewal

INSO CDs and DDs also suggested that members should be required to furnish INSO with useful feedback as a condition of their annual membership renewal. These would go further than satisfaction surveys. A message such as the following could appear early in the online registration process: "INSO is a free service, but we need your feedback to assist us in our evaluation, monitoring and learning (MEL) efforts and to further improve our relevance to what you do and the challenges you face. We need feedback from you about whether and how INSO products and services have made a difference in your humanitarian work. Focusing on impacts, please provide us with concrete examples from your experience with INSO over the past year about how INSO has changed what you do, how you do it, and with what effect. This feedback will be kept confidential". Alternately, members could be required as part of the renewal process to fill in a survey that, once coded, could provide a useful baseline for evaluating impacts in subsequent years. A sample of such a survey has been provided separately to INSO as part of the review.

6.1.3 Impact harvesting at Safety Advisor / Deputy Safety Advisor and Country Director conferences

The periodic SA / DSA Conferences held at platform level, and Country Director conferences convening CDs with SDs and other members of the senior management team, provide excellent opportunities for impact harvesting exercises. A sample impact harvesting workshop agenda for SA / DSA Conferences, and a similar exercise for the CD / RD / OSO level, have been provided separately to INSO as part of the review.

6.1.4 Impact harvesting through surveys: Tightening up the questions, asking for concrete examples

INSO platforms already circulate annual satisfaction surveys among their partner NGOs, with results being incorporated into donor reporting. Beyond donor reporting however, their usefulness provides INSO with limited feedback about the outcomes and impacts of its work and are insufficient for

providing a baseline against which INSO performance can be measured over time.

As mentioned above, sample baseline survey questions have been provided separately to INSO. This will require fine-tuning to fit each platform context. Specifically, respondents might be asked to assess INSO performance on context-specific issues that have arisen: cases of INSO representation, crisis interventions affecting the entire platform membership or INSO influence on suspend / withdraw / close decisions.

6.1.5 Capturing impacts of training

INSO's training managers see value in capturing the impacts of training: a better grasp of what differences training makes helps them to adjust training content and delivery globally and in each context. With guidance from the OSO, INSO's training section in Nigeria has been experimenting with a way to capture impacts of its trainings through visits to INSO members in the field two months after they have sent their staff to Basic Security Management or HEIST trainings. Training graduates are canvassed for examples of how the training made a difference in what they do. It promises to yield a better understanding of training impacts than a satisfaction survey can capture.

6.1.6 Demonstrating 'value for money'

In the absence of a mature INSO platform, member INGOs and NGOs would need to spend substantially to obtain a comparable level of safety preparedness and awareness of context. There are several ways to demonstrate this in terms of the value-for-money provided by INSO as a common service provider of safety products and services.

When reporting to donors, the value-for-money realised by INSO as a common service can be demonstrated at platform level by determining the cost of personal safety and other trainings available locally (or with additional travel costs) for a fee, and multiplying these costs by the number of participants that have received trainings from INSO at no cost. In platforms with full training programmes, these costs will be considerable.



Field Note 33.

Mercy Corps Nigeria has sent approximately 50 staff to INSO HEIST trainings. According to Mercy Corps if it had paid a provider for these trainings the cost to Mercy Corps would have been approximately US\$70,000.

"It costs a lot of money to send people to Nairobi for training. Having them locally [provided by INSO] is a big value-added." INGO Country Director in Somalia

The cost of a personal safety training from RedR in eastern Afghanistan is €220 / person

A former INGO country director noted that his organisation sent "dozens" of staff to HEIST and other

INSO trainings and noted that it can take his organisation up to a year to approve funding for safety-related trainings. "It can cost \$1500 per person to send someone to a training. If I have 120 staff to train, we can't afford that."

Similarly, if commercially-available context reporting products are being used by some aid providers in a particular context (BBC monitoring, Global Intake 2.0, Crisis Group, Iraqi Oil Report, etc.), these can be costed by INSO platforms and juxtaposed against the comparable INSO reports available to members at no cost.



Field Note 34.

*A **safety advisor with a large INGO** described several for-fee analytical publications offering conflict and corporate intelligence reporting on the Horn of Africa, with subscription fees ranging from several hundred to several thousand Euro. He contrasted these with INSO reports that are available to him at no cost, asserting that INSO's "bespoke" reporting was of higher quality due to its use of multiple-source verification and of greater relevance to humanitarian safety. He uses INSO reports to triangulate information gleaned from his own sources. Similarly, a donor representative covering Somalia favourably compared INSO's no-cost reporting with the information available from BBC Monitoring for a fee.*

*"In the absence of INSO, every NGO would have to pay the overheads for the services that INSO provides them with now for free." **Donor representative in Nairobi***

It may also be possible for platforms to take note in their reporting to donors where likely cost savings are being realised by INSO members who do not employ their own safety advisors, but who make heavy use of INSO products and services as a proxy for paid safety advisors. Average salaries for international and local safety management staff are obtainable with a phone call to members who employ them. These amounts can then be multiplied by the number of members who do not employ safety advisors and who instead make heavy use of INSO products and services. Even if there are only a few such members, the cost-saving to the humanitarian apparatus is likely to be considerable.

Finally, INSO platforms can make a valid point about value-for-money by mentioning the cost of maintaining its large network of field monitors as an aspect of its common service. If every member

NGO in dangerous areas needed to maintain such a network, the costs would be immense.

6.1.7 Impact products?

A donor representative suggested a bi-annual snapshot or digest of INSO impacts based on qualitative feedback from INSO members who have made use of products and services. Another suggested that an annual "Impact Report" would make for a fascinating and insightful read. Appended to donor reports and made available on the INSO website, such products would go a long way toward familiarising potential new platforms and partners with what INSO does and with what results. A good example of an impact report, though not in the realm of humanitarian safety, is the Humanitarian Leadership Academy's Impact Report 2017 / 2018²⁵. Another possibility would be a 'Success Story' section on INSO's website putting various outcomes and impacts on display, with suitable editing-out of details that could identify agencies or places.

These products would essentially be marketing tools for INSO, but a functioning MEL system would also equip INSO with an evidence base from which to generate learning and advocacy tools for use in its own training programme and for influencing policy and practice developments within platforms and globally.

6.2 Should INSO formalise the Monitoring, Evaluation and Learning function?

At present, INSO's minimal MEL efforts are insufficient for capturing INSO's outcomes and downstream impacts and are divided between various staff. The Executive Director and Regional Directors oversee the standardisation of products and services between platforms and ensure compliance. The Training Manager oversees training quality and the formulation of a process to capture its impacts. Country Directors monitor the quality of products and services, and periodically conduct satisfaction surveys.

Many INSO staff have an intuitive understanding of their impacts at the operational level and use this understanding to inform their daily work. However, the lack of reflective systems and processes for capturing and digesting their experience means that opportunities are missed for preserving what has been learned. Improved MEL will allow INSO to build on what it learns over time. Adjustments to products and services, anticipation of and planning for new eventualities, development of best practices within and between contexts, and demonstrating INSO's value more effectively are some of these missed opportunities.

²⁵ Humanitarian Leadership Academy (May 2019), "Knowledge is Power: Global Impact Report 2017 / 2018." <https://www.humanitarianleadershipacademy.org/wp-content/uploads/2019/05/Humanitarian-Leadership-Academy-Impact-Report-2017-2018.pdf>

A greater focus on impacts will entail an additional investment of time and resources. INSO needs to make its own determination as to how it pursues a monitoring, evaluation and learning function geared to capturing its impacts that is a good fit with its evolving organisational culture. Much depends on where INSO sees itself along its continuum of growth from INGO start-up to maturity. INSO's Board of Trustees has a diverse range of experience that could usefully be brought to bear on how best to implement MEL in INSO's organisational culture. Although OSO staff consider INSO to be a very reflective organisation with high levels of input from all levels, field visits to the platform level revealed a strong and fairly consistent perception that the current management structure is hierarchical and directive, wherein the present dynamic sees platform staff primarily as implementers of plans and processes engineered centrally in the OSO, which also sets delivery standards²⁶. Accordingly, the extent to which INSO has been developed as a learning organisation is relatively small so far in comparison with other organisations that have been around longer and actively encourage the participation of staff at different levels in reflective practice on their core functions, with opportunities for feeding back to the organisation what they have learned. As INSO's organisational development progresses into maturity, more room for creative and decentralised ways of working is likely to become more possible.

Under a directive management style, the customary route would be to put the MEL function within a functional silo. This has the advantage of concentrating efforts in a single position responsible for introducing MEL systems and overseeing MEL exercises. A roving MEL officer, based in the Dubai office, would presumably oversee the introduction of MEL systems in the platforms and ensure compliance with them over time. While control over this role could be exercised relatively more easily than a decentralised MEL function, the workload would be immense. It would also confer the added disadvantage of relieving platforms and their talented staffs of the felt responsibility to capture the consequences of their work themselves. There could be implications for the investment they feel they have in INSO, how much they feel they are entrusted with the tasks of helping INSO to learn from experience and, most importantly, for the results of MEL itself. Unless staff are brought meaningfully into the MEL function as collaborators in a process, there is a sizeable risk that MEL becomes seen as an accountability tool being wielded over them and not a device for feeding into organisational learning. This would certainly taint the results of MEL efforts.

At the other end of the spectrum from a siloed function is mainstreamed MEL, wherein the role is decentralised to the field with guidance from the OSO. Mainstreamed MEL would place the onus for capturing impacts on platform staff in the course of their work, facilitated by systems that could be standardised from the OSO (such as some of those mentioned above). In this scenario, those who are best acquainted with detailed information about their safety interventions and their context would be tasked and mentored to use that knowledge for MEL purposes, making it less

necessary for relative outsiders to visit and pass judgement on the fly, also potentially fostering more ownership and constant reflection over the jobs they do. It is well worth noting that INSO platform staff include many talented local and expatriate analysts who are accustomed to thinking in terms of causes and effects and packaging their analyses well. Whether their formal position is CD, DD, SA or DSA, this constitutes a pre-existing pool of talent to perform the MEL function. Harkening back to the methodological considerations described in the introductory section, the MEL function would be facilitated in at least one important respect if embedded in the jobs of platform staff: it would avoid the difficulties of taking retrospective looks at impacts because their evolution could be more closely monitored and captured in real-time.

The disadvantages to mainstreaming MEL include the necessity of delegating an important function to platforms that are already under severe time pressures in some cases. An introductory period would be labour and time intensive until systems were introduced, understood, and functioning well, and staff made comfortable with their new role as evaluative thinkers on INSO's behalf.

An interesting first option that surfaced during the visit to the Afghanistan platform was to pilot mainstreamed MEL in that platform, with outside assistance for detailed design and input from other platforms at various points in its development.

At present, INSO's minimal MEL efforts are insufficient for capturing INSO's outcomes and downstream impacts.

²⁶ Most staff also readily acknowledged the propriety of this approach as INSO consolidates as an organisation.

7 PART V: CONCLUSIONS

INSO has impacts at different levels on the humanitarian safety environment and the safety-related behaviour and decisions of the aid apparatus.

Structural impacts at a global level include positive changes in the way safety challenges are managed by the NGO community by virtue of INSO's ability to deploy effective and durable safety coordination platforms across a wide variety of contexts. INSO's impact on humanitarian architecture is indicated by the fact that apart from those started under INSO auspices, no other safety platforms, with the relatively short-lived exception of the SSCL in Lebanon, have arisen since the advent of INSO in 2011. Increasingly, INSO is seen by the humanitarian community as a standard and necessary fixture of aid responses in difficult environments. Local NGOs in particular have benefited from INSO's no-cost products and services: this alone represents a major step forward in meeting Grand Bargain Commitments to attend more responsibly to safety needs among local actors.

Consistent with many of the recommendations made in "Stay and Deliver" and "Presence and Proximity", INSO's impacts surpass the saving of aid worker lives by enabling the humanitarian community to maintain effective programming in acutely challenging environments.

In this direction, INSO's interventions do two impactful things: *they promote adaptive and professionalised safety management such that safety postures are calibrated accurately to prevailing risks, and they disrupt potentially cyclical, maladaptive behaviours and decisions taken by the aid community in response to acute insecurity and shocks.* Indicators of positive impact at this level include proximity and presence, engagement and expansion, but the weight of these impacts is borne by a potent set of operational impacts that accrue over time from INSO's offering of safety products and services.

The operational impacts of INSO in day-to-day field operations and security management are the fuel that animates enhanced abilities to stay and deliver. They are often indicated by reduced vulnerabilities (e.g. to violence or uncertainty) and strengthened capacities (e.g. to absorb shocks or manage tense situations appropriately), and are evidenced by changes in behaviour, practice and policy. As the examples encountered during the review illustrate, they range widely from INSO's provision of a common service, to its roles as buffer and common front, repository and channel for incident data, enabler of crisis management, topical authority, technical resource and author / editor of an independent, humanitarian-focused safety narrative.

There is no simple formula for isolating and attributing these impacts to INSO's interventions in complex environments. The necessary causal analysis needs to be thoroughly informed by the patterns of adaptive and maladaptive aid agency behaviour and good practice captured and described in "To Stay and Deliver",

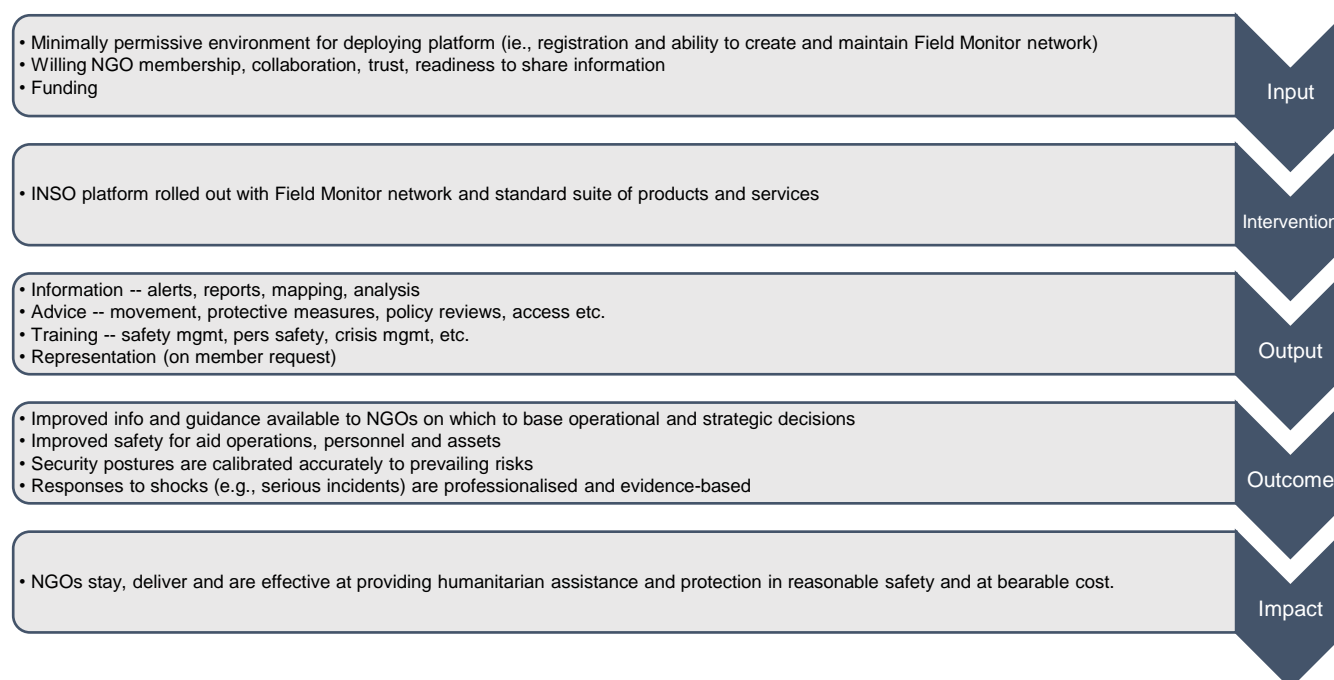
"Presence and Proximity", and other relevant research, and placed in highly localised context.

Improved tracking of its impacts will allow INSO to tailor its interventions even more closely to context, derive lessons learned and best practices both locally and globally, contribute more and with greater authority to policy and practice developments, and demonstrate its contributions with a sound evidence base of impacts.

To do this in an ongoing and systematic way, INSO needs to give consideration to formalising its MEL function in a variant of MEL that suits INSO's organisational culture. Case-based evidence from field level illustrates that impacts can be isolated, captured and presented episodically as meaningful but limited evidence of the difference that INSO makes in humanitarian contexts. As an organisation skilled in analysis, formalising a MEL system will enable new possibilities for doing so in a more fruitful way. Careful regard for the intricacies of causation, and close-in monitoring of the interactions between INSO's interventions and their surroundings, will be central to whatever processes are adopted. Good documentation of case-based analysis, supported by scored survey research where called for, will build an insightful and compelling case.

INSO's structural 'stay and deliver' impacts have not been reflected so far in INSO's working Theory of Change, although the organisation is well aware of them and works diligently to achieve them. This understates INSO's contribution and abilities, the ultimate measures of which are INSO's deployment of effective safety platforms that work to enable NGO abilities to stay and deliver effective humanitarian aid in reasonable safety and at bearable cost.

INSO's impacts surpass the saving of aid worker lives by enabling the humanitarian community to maintain effective programming in acutely challenging environments.



The examples of impact that emerged during the review were suggestive of ways that INSO can further optimise its impacts and address limitations. INSO has reached the point of maturity where its foundations are well-laid and its credibility as a purveyor of credible analysis and advice is not questioned. It now has the option – and, arguably, the responsibility – to shift more of its attention to broader analytical challenges, lessons-learning and best-practices relevant to aid worker safety and humanitarian access, enlisting its skillset and its data to further illuminate how to make aid work safer so that more people can be reached with what they need, when they need it and with greater reliability.

7.1 A more strategic impact on safety?

INSO is increasingly well-positioned to have a greater impact on humanitarian safety developments. Until now, INSO has largely been resourced to lay the foundations of a strong but still relatively young field-based organisation able to perform consistently well in a highly specialised field safety role. INSO senior management contends that policy and practice changes have migrated upwards from INSO's strong field focus, and there is little doubt that INSO's growing field presence, experience and reputation will lead to it being listened to more carefully in coming years, particularly as its global products take flight. However, greater impacts at the structural level of safety architecture, such as the SLT and global policy fora, are more likely to accrue from INSO having made a conscious choice to become a more proactive colleague in policy and practice circles.

During the review, members, partners and donor representatives were almost uniformly eager to see INSO play a more influential and proactive role in policy and community of practice circles, mainly because of the benefits they believed would accrue from

an infusion of the knowledge absorbed through INSO's sustained and diverse field presence. Especially if it continues to grow its evidence base of impacts through formalised MEL, INSO has several unique attributes that it can leverage to inform the development of humanitarian safety policy and practice on a global scale:

- A sustained presence, including at 'deep-field' level, in most of the contexts where aid worker safety poses the biggest challenges to effective humanitarian responses;
- Extensive primary data on NGO-related safety incidents;
- A cadre of experienced humanitarian safety specialists with a uniquely holistic view of the humanitarian apparatus;
- A growing ability to analyse its experience across many different contexts and to harvest lessons-learned about aid worker safety and its downstream impacts on humanitarian responses;
- The trust of a strong constituency of field-based operational partners and others in its roles as common service provider, field-level coordinator and representative;
- Further development of an outward-facing research and analysis role, building on a nascent but growing set of global products that promise to inform and enable bespoke analysis, thematic and comparative research on a global scale.

Greater engagement beyond field level will have obvious resource and other implications. To date, INSO's lack of resources to engage at this level has focused its work almost entirely at field level,

supported by the OSO. The pursuit of an even more ambitious global structural impact through policy and practice contributions – likely to be dramatically enabled by its CHDC - will still be a comparatively small adjunct to INSO's primary activity in the field.

However, the argument in favour of engaging at both levels lies in their complementarity, with potentially exponential impacts for field safety. In particular, the advent of the CHDC, in combination with a better awareness of impacts informed by systematic MEL, logically leads to a much-enhanced ability to explore and understand incident causality in potentially ground-breaking ways to further improve field safety.

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ANNEXES

Annex 1: Interviews

South Sudan

Mike Walker, Country Director, INSO SSD
 Antonio Galli, Emergency Specialist, Access, UNICEF
 Charles Wani, Country Director, Sustainable Children
 Paul Biel Otong, Country Director, Nile Hope
 Kristin Pristupa, Humanitarian Affairs Officer (Access), UN OCHA
 Asim Jan, Humanitarian Access and Safety Advisor, Lutheran World Service
 Hedd Thomas, Staff Welfare Manager, Tearfund
 Marino Oyet Anthony, Advisor to the Management on Security, ICRC
 Andres Alejandro Gutiérrez, Security Focal Point, South Sudan NGO Forum
 Garth Smith, Programme Manager and Acting CD, DRC
 Ambassador Jan Hendrick van Thiel, Embassy of Germany
 Cobi Rietveld, Country Director, PUI
 Deng Dingdit, Deputy Safety Advisor, INSO SSD
 Maria Caterina Cirimelli, Assistant Director, INSO SSD
 David Jesson, Training Manager, INSO SSD
 Dandre Jansen van Vuuren, Safety Advisor, INSO SSD
 Martin Ochere, Deputy Security Focal Point, South Sudan NGO Forum
 Maria Caterina Cirimelli, Assistant Country Director, INSO SSD
 Alyse Kennedy, Safety Advisor Mobile, INSO SSD

Somalia

Philippe Durand, Director, INSO HOA
 Mohammed Younis Alshafe, Deputy Director, INSO Somalia
 Lev Domrachev, Safety Advisor, World Vision
 Jitendra Panda, Country Director, Health Poverty Action
 Mubarik Mohamed Alin, Deputy Safety Advisor INSO Somalia
 Omar Mohamed, Country Director, Mines Advisory Group (MAG)
 Abdilahi Mohamoud Hassan, Country Representative, Havayoco, Somaliland
 Nafiisa Yusuf, Executive Director, NAGAAD Network
 Jirdeh Nimo Mohamoud, Swiss Development Cooperation
 Halimo Weheliye, Somalia NGO Consortium Reg. Coord. Somaliland - Puntland - Galmudug
 Lena Voigt, Somaliland Area Coordinator, World Concern
 Sadia Abdi, Country Director, ActionAid Somaliland
 Edward Callahan, Safety Advisor, GIZ
 Azam, Director, Al Dawa AL-Islamia Organisation
 Mohamed Ahmed, Country Director, Hamdan ibn Rashid Organisation
 Olivier Blaise, Safety Manager, ACTED
 Birgitte Hotz, Safety Advisor South / Central, INSO Somalia
 Quentin Le-Gallo, ECHO (Nairobi)
 Ajmad Ali, Country Director, Oxfam

Afghanistan

Maarten Konert, Country Director, INSO Afghanistan
 Ermina Strutinschi, Deputy Director, INSO Afghanistan
 Daniel Potts, Safety Advisor East, INSO Afghanistan
 Bakhtyar Gilaman, INSO East DSA, INSO Afghanistan
 Yurii Khomchenko, Safety Advisor West (Herat), INSO Afghanistan
 Esmee de Jong, Head of Office, ECHO
 Silvana Hogg, Director of Cooperation, SDC

Will Carter, Head of Programme, Norwegian Refugee Council
 Juan-Pedro Schaerer, Head of Delegation, ICRC
 Head of Sub-Delegation (Herat), ICRC
 Sean Ridge, Humanitarian Affairs Officer (Access), UN OCHA
 Maxime Kamarzaev, UN DSS FSCO Eastern Region (Jalalabad)
 Fiona Gall, Director, ACBAR
 Iris Ruttig, Afghanistan Analysts Network (AAN)
 Thomas Ruttig, Afghanistan Analysts Network (AAN)
 Office Manager, Save the Children International (Jalalabad)
 Security Manager, Save the Children International (Jalalabad)
 Alessandro Cipri, Safety Advisor Central, INSO Afghanistan
 Charity Watson, Safety Advisor (Mobile), INSO Afghanistan (by e-mail)
 Ziemowit Nawojczyk, East Region Area Mgr, Danish Refugee Council
 Sediqullah Jalili, Security Mgr, Relief International
 Niamat Mujaddadi, Security Officer, Swedish Committee for Afghanistan (fmr IO INSO East)
 Haji Shoar, Security Officer, Save the Children International
 Faridullah Mushfiq, Provincial Mgr, Save the Children International
 Ibrahim Alimzai, National Safety Mgr, Mercy Corps (fmr INSO East DSA)

Nigeria

Vincent Vial, Country Director, INSO LCB
 Ahmed Mohammed Ogwuche, Training Manager, INSO LCB
 Patrick Sayers, Information Manager, INSO LCB
 Marianna Franco, ECHO
 Yassin Gaba, Deputy UN Humanitarian Coordinator
 Anne-Sophie Dupeyras, Deputy Country Representative, Terre des Hommes
 Chiara Crenna, Area Director (Maiduguri), InterSos
 Joanna Garbalinska, Nigeria INGO Forum
 Shahid Sadiq, Safety Manager, Mercy Corps
 Usman Ibrahim, Safety Advisor East (Maiduguri), INSO LCB
 Marcello Viola, Country Director, Street Child UK
 Jan Goepel, Security Manager, ACTED
 Daniel Amos, Civil-Military Coordination Officer, INSO (Maiduguri)
 Lionel Pechera, UNHAS / UNOPS (Maiduguri)
 Snorre Haugan, Security Advisor, Norwegian Church Aid (Maiduguri)
 Bruce Walker, Chief Air Transport Officer, UNHAS Nigeria
 Robert Marinovic, UNDSS
 Michel Emeryk, Access Officer, WFP
 Myriam El Kholi, Dep. Head of Delegation, ICRC
 Charles Wanjue, Senior Humanitarian Advisor, OFDA, USAID
 Eric Batonon, Country Director, Norwegian Refugee Council
 Patrick McCarty, Deputy Director, INSO LCB

Syria

Ross Baillie, Country Director, INSO Syria
 Alberto Giera, Deputy Director Operations, INSO Syria
 Mahaut De Talhouet, Syria East Safety Advisor, INSO Syria
 Karokh Khorany, Response Security and Analysis Manager, World Vision Jordan / Regional Office
 Patrick Duplat, Humanitarian Affairs Officer / Analysis, Regional Office for Syria Crisis, UN OCHA
 Paul Handley, Head of Office, Regional Office for Syria Crisis, UN OCHA
 Jim Arbogast, Regional Safety and Security Advisor, Mercy Corps
 Erin Blankenship, Regional Analyst, INSO Syria
 Derek O'Rourke, Safety and Security Advisor, GOAL
 Maiwand Halaimzai, Syria North Safety Advisor, INSO Syria
 Simon Burroughs, Syria South Safety Advisor, INSO Syria
 Nick Jones, DFID (Syria Response)

Viren Falcao, DFID (Syria Response)
 Zulfiye Kazim, Director, NE Syria INGO Forum
 Olivier Leconte, Country Director, Solidarite International
 Olivier Rousselle, Head of Office, ECHO (Syria Response)
 Irem Mazmangi, Regional Safety and Security Director, IRC (email)

Iraq

Scott Bohlinger, Country Director, INSO Iraq
 Sam Callum, Country Security Manager, Norwegian Refugee Council
 Hector Carpintero, Head of Mission, InterSos
 Paul Thomas, Head of Field Support, UN OCHA
 Carla Brooijmans, Head of Mission, MSF

Other

Nic Lee, Executive Director, INSO
 Caelum Moffatt, Chief Analyst, INSO (OSO)
 Mario Stephan, Chairman of the Board of Trustees, INSO
 Ramsay Morgan, Global Safety Manager, INSO (OSO)
 Patrick Malach, Safety and Training Manager, INSO (OSO)
 Sonia di Mezza, Trustee, INSO
 Joachim Schmitz, Operations Officer, UN DSS (NY)
 Berit Kasten, Division for Humanitarian Assistance: Operations, German Federal Foreign Office
 Banu Altanbas, Regional Manager for Great Lakes, International Alert (former INSO)
 Amarins Gerlofsma, Programme Officer, Humanitarian Aid, MINBUZA (Netherlands)
 Marcos Ferreira, Section Director Kenya, Somalia, S. Sudan, Lake Chad Basin, INSO
 Martin Hopper, Programme Manager Security / Risk Management, DFID (UK)
 Tomas Muzik, Regional Director West Africa, INSO
 Scott Richards, Operational Safety Advisor (former INSO), Palladium
 Nick Downie, Regional Director Middle East / Central Asia, INSO
 Koenraad van Brabant, Consultant (email)

Annex 2: INSO Platforms, Products and Services

The ‘bedrock’ of INSO is its networks of Field Monitors (FMs) in each platform. These are hand-picked local people who, by virtue of their role in their community, profession, location or other characteristic are well placed to monitor their local situation for conflict and safety incidents and report on these and other conditions regularly to INSO. Some FMs are employed by INSO as staff, while others work under less formal contractual arrangements. INSO has developed a standard protocol for the identification and management of FM networks. The number of field monitors in a platform is generally dictated by need and availability, and availability improves as platforms become more established. Numbers of FMs vary widely between platforms.

Deputy Safety Advisors (DSAs) are INSO local employees, and where FM’s were described earlier as the bedrock of INSO operations, DSAs were described as the backbone. Their main role is to manage their network and their assistant DSA while also interacting extensively with INSO members. DSA’s are responsible to INSO Safety Advisors (SAs) who are normally expatriates. The DSAs and SAs and their support staff constitute an INSO field office with the SA managing the operation and overseeing the DSAs.

Safety advisors perform management, analytical, reporting and representational roles. A country platform may contain one or several field offices depending on need, and these can either be within a single country, as in Afghanistan, or in several, as with the Syria platform (Syria, Turkey, Lebanon and Jordan). Field offices and operational functions in general are overseen by the platform’s Deputy Director, who also plays an analytical, reporting and representational role. Other elements of a country platform normally include an information officer, GIS-IT staff, training officer with staff and, in some of the platforms visited for the review, a regional analyst. These functions are all supported by finance, admin, and human resources sections. The INSO Country Director (CD) has overall management responsibility for the platform and oversees hiring and firing decisions and safeguarding the INSO ethos.

Platforms are clustered by geography and fall under one of three roving Regional Directors (RDs) who support platforms with operational guidance, mentoring on programme management, and fundraising. The Operational Support Office (OSO) in Dubai houses INSO’s Executive Director, Director of Operations, Chief Analyst, Safety and Training Department, Chief Technology Officer (remote), Audit, and Support. The Director of Operations role was recently filled to replace the previous HR Director.

INSO’s governance at platform level consists of the advisory board, which is fundamental to and most active during the start-up phase of new platforms. Advisory board members can be either international or local NGOs but in practice most are INGOs. They serve as facilitators of INSOs entry, helping INSO to make contacts in the community, propagate news of their arrival and services, and secure registration. A key function of the advisory board at the outset is to define with INSO the Scope of Services to be furnished by INSO. This may change from place to place but INSO’s fixed menu of options has eased the process. Participation of advisory board members in INSO typically reduces as the platform becomes more firmly established and INSO’s connections to the aid community become stronger. However, changes in the safety environment can lead to greater involvement by the board.

At the global level, INSO is governed by a Board of Trustees numbering six members, increased by three since the last review. Members include persons experienced with INSO as beneficiaries or as former staff, and reflect humanitarian, legal, security, donor and business backgrounds. The trustees typically meet quarterly to approve accounts by remote, and annually face-to-face when INSO convenes its Country Directors.

Country platforms and the OSO are funded separately, although donor funding for the OSO includes the Direct Project Support (DPS) mechanism that is reserved for delivery of services in the field. The DPS has so far been used to start or support INSO responses in CAR, Iraq, Syria, South Sudan, and Lake Chad Basin. INSO’s funding sources include (or have included) ECHO, DFID, the Dutch, German, Swiss and Spanish foreign ministries, USAID/OFDA, and the UN.

In addition to standardised guidance on management of field monitors, INSO has invested heavily in developing standards across the board for verification of information, products and their delivery, vetting of members, writing styles for reporting, and so on. The rationale for standardisation is to ensure consistent quality within platforms to enable continuity during staffing changes, and consistent products between platforms so that aid workers newly arrived on scene will find INSO’s products and services familiar and predictable from setting to setting.

Membership in INSO is restricted to NGOs, local or international. Formerly, members were required to be signatories to the Red Cross / Red Crescent Code of Conduct for NGOs in Disaster Relief, but this proved to be restrictive and the requirement was discontinued.

INSO’s wide range of products and services have evolved out of the Afghanistan experience and are classed as either on-demand or scheduled. All are provided free of charge to members, which represents unprecedented access to specialist products particularly for smaller

or local NGOs. Within these categories there are products and services clustered around information analysis and advice, in-person services, and data and information. Together they target tactical, operational and strategic levels of decision making within beneficiary organisations.

INSO generates an average of 1100 Alerts and Reports each month. INSO Alerts are a first informational line of defence dispatched by INSO. They are sent by INSO as soon as information has been verified in order to inform recipients of an imminent threat or to warn them that an incident that could affect them has happened. Alerts are issued by SMS, e-mail and / or HF radio, and sometimes through Skype chat groups. When safety conditions are extreme and widespread, as they were during violent elections in Afghanistan, hundreds of alerts can be issued by INSO over the course of a single day, although that is not typical.

INSO Reports follow Alerts and are generated and e-mailed to provide more detail, analysis and advice. Recipient organisations choose who among their staff receive INSO Reports. Incidents tracked by INSO are compiled into Weekly Incident Lists on Excel spreadsheets, and include mostly conflict-related incident with special notations for incidents involving NGOs. Multiple safety managers and country directors affirmed the importance of this data for triangulating with their own. For smaller NGOs it is their only source of incident data, while many larger INGOs also incorporate it into their own incident tracking systems, a scenario encouraged by INSO.

Biweekly Reports are a scheduled product, going into more depth on trends and analysis. These are released on the same days each month across all platforms. Quarterly reports go into still more depth and are prepared by INSO CDs for member CDs and partners. Their thrust is trend analysis and macro-level insight.

In-person products and services include weekly safety Roundtables held at the field office level. These safety coordination meetings are typically convened by the Safety Advisor, who presents INSO's latest updates on the safety environment then opens the meeting for discussion and information sharing. Steps are taken to stage the meetings as a safe space for NGOs – mainly safety and security managers but programme officers and other managers too – to talk about safety issues among their peers. Incidents are anonymised during discussions when that is called for by INSO's and its members' commitments to confidentiality. Monthly Country Director Meetings are convened at platform level by the INSO CD: these have a more tactical and strategic focus and are meant as a forum for discussing challenges and sharing information at the top managerial level of members.

Platforms offer periodic Orientation Briefings according to demand. These are meant to familiarise newcomer NGO staff with the context and its safety implications. During interviews, these were mentioned as particularly insightful gatherings that often helped to expand INSO's networks among the NGO community. Also on request, INSO provides Site Reviews of physical security at NGO facilities, and Safety Policy Reviews to ensure that an NGOs plans are up to an acceptable standard. Both of these reviews involve INSO in a specialist advisory role that is often unavailable to under-resources smaller NGOs.

INSO's delivers a wide range of free of charge trainings to members and partners. Although they were formerly contracted to RedR and other providers, they are now designed and furnished directly by INSO. While incorporating best practices drawn from experience worldwide, they also include components that are adaptable to local contexts. INSO trainings are typically in high demand and include personal safety, basic and advanced safety management, guard-force management, first aid, crisis management, fire protection and so on. As noted in more detail below, the cost-saving to NGOs through INSO trainings is immense.

Crisis Assistance is also offered by INSO, at two levels. During responses to individual agencies, INSO provides advice and consultation on request and sometimes sits in with the crisis management team in a support role if asked to: providing specialist advice, stakeholder analysis, references to specialist services such as medevac arrangements, trauma counselling, and so on. When asked, INSO also plays a role in Community Scale crisis management such as setting up concentration or hibernation points, arranging evacuation plans with other interlocutors, deconfliction with military forces etc.

INSO's data and information services support operational, monitoring and research needs²⁷. At the global level, INSO currently offers three services: the World Alert, a daily digest of all Alerts sent across all platforms that day; the interactive Key Data Dashboard for key NGO safety data for each platform, and meant to inform advocacy, research and policy planning, and; a quarterly Safety and Access Review and a monthly Key Data Analysis prepared by INSO's Chief Analyst with input from platform Quarterly Reports and the KDD respectively. These are comprised of both platform-specific data overviews and trends, as well as aggregate data covering all of INSO's deployments, and combine mapping and data analysis with field-led narrative to provide an evidence base for humanitarian action.

²⁷ Drawn from INSO (2019). *The global products were not reviewed with the exception of the CHDC in its testing phase.*

Annex 3: Terms of Reference

INSO Background

Founded in 2011, INSO is a British charity that supports the safety of aid workers by establishing coordination platforms in insecure contexts. INSO provides registered NGOs with a range of free products and services, including real-time incident tracking, analytical reports, safety-related data and mapping, crisis management support, policy reviews, staff orientations and training. INSO assists NGOs with their day-to-day risk management responsibilities and aims to improve the adoption and application of evidence-based data and analysis in situational awareness, operational planning and policy development related to humanitarian safety and access. INSO has developed from an innovative start-up to become a globally recognised NGO and a valuable component of the humanitarian coordination infrastructure. INSO offers independent and high-quality services to more than 850 NGOs every day in twelve of the world's most insecure countries and has earned a strong reputation for its performance, principles and professionalism.

Working Assumption

The International NGO Safety Organisation (INSO) has structurally revolutionised the NGO safety coordination system – making support platforms more accessible, inclusive, relevant and higher quality than ever before – and in doing so has strengthened NGO capacity to 'stay and deliver' in volatile contexts by assisting partners in identifying, planning for and mitigating programme and access risks at all levels.

Objectives and Scope of Research

In 2017, UNOCHA noted that INSO platforms have become “standard features of the humanitarian response in volatile contexts”.

The purpose of this study is to unpack the details behind this development and set out exactly what has been achieved, how and to what end. More specifically, the associated objectives of this study are to define and describe how the humanitarian safety infrastructure has changed since 2011, analyse and assess what this has meant for both the perception and practice of humanitarian safety as well as observe and outline the resulting incorporation and impact of humanitarian safety in broader discourses within the humanitarian system.

This is primarily a study of impact, but it will clearly differentiate between the impact of INSO on the humanitarian infrastructure and the impact of INSO on NGO programming. By documenting INSO's overall impact to date, this review will provide a preliminary yet credible baseline for further research that will inform and instruct INSO's ongoing aims and methods for evaluating impact. The Strategic Review will be conducted over a three-month period with the deadline for submission scheduled for Wednesday 1 May 2019.

Chapter One (20%)

Firstly, this review will aim to capture and describe INSO's structural impact by addressing the question: how has INSO affected the overall architecture of NGO safety coordination on a global scale?

Overall, the objective of this chapter is to provide a broad overview of how the humanitarian safety structure has changed and to outline the key dimensions of the globally standardised system that are currently in place. While first looking at what INSO represents in terms of its approach, namely a move towards NGO self-reliance and structural standardisation, the chapter will then adopt and apply a comparative 'before/after' perspective¹. Key segments of this section could include: •What impact has INSO had on the overall availability of safety coordination platforms globally? Has it made them easier or more difficult to start? Are they more common and sustainable? Has INSO enabled platforms that might not have existed before or otherwise? •What impact has INSO had on the perception of such platforms amongst NGOs, donors and other stakeholders and their willingness to engage through them? Are they seen as 'standard requirements'? Are NGOs more willing and able to cooperate with each other than before? Do donors see them as relevant and necessary? •What impact has INSO had on the accessibility of, and participation in, such platforms, particularly for local NGOs? Are they more inclusive than they used to be? Are local staff needs represented and addressed? Are NGO needs and priorities reflected in INSO's programme design? •What impact has INSO had on the quality and interoperability of such platforms? Are they more consistent with each other than before? What impact has this had on use, perception and participation? Has INSO introduced and developed a standardised incident reporting mechanism? •How has INSO impacted the funding available for humanitarian safety coordination? Are donors more aware of ways in which they can channel investment and support towards humanitarian safety? Has INSO been able to emphasise or change the perception of needs and/or draw funds for safety coordination in to forgotten crises? •How has INSO impacted NGO/UN relations? Has it improved or undermined information sharing under SLT? How has it impacted NGO access to UN information and support? Has it had any impact on NGO representation or advocacy?

Chapter Two (60%)

This chapter will refer and relate to INSO's operational impact by addressing the question: what impact is INSO having on NGO practices, programmes and policies? Framed by the assertion that INSO does indeed 'improve access and save lives', the broad aim of this chapter is to understand precisely how NGOs integrate INSO services in to their work, at both strategic and programming levels, and what effect and impact INSO has on their ability to deliver humanitarian aid while keeping their personnel and programmes safe. Key segments of this section could include:

- What impact do INSO services have on NGO strategic planning (both in terms of presence and programming)? Is information or advice routinely incorporated and, if so, when, how and to what effect? How important are INSO services to this process?
- What impact do INSO services have on NGO project cycle management? Are they taken into consideration and, if so, when, how and to what effect? Are they central or peripheral to the process?
- 1 Comparing what exists today to conditions prior to INSO, pre-2011
- What impact does INSO have on NGOs in terms of routine operational safety management? How are services handled and integrated into daily operations and to what affect (on people and programmes)? Are they central or peripheral to the process? What would be the potential implications for NGOs if these services were absent or discontinued?
- What impact does INSO have on the ability of NGOs to 'stay and deliver'? Are NGOs more likely to access/remain in high risk areas due to INSO? How do our services support decision-making and how important are they in the process?
- What impact are INSO global initiatives having on the ability of NGOs to identify, plan for and mitigate risks concerning programming and people? Are they contributing to the solving of common problems related to information, data and analysis? Are global products used to inform situational awareness, operational planning and policy development at HQ level?
- What impact is INSO having on global policies, thinking and approaches to NGO safety and access? What does it contribute to global initiatives, such as the Grand Bargain, the Leave No One Behind agenda and #Notatarget?

Chapter Three (20%)

The third chapter will draw on previous sections to identify INSO's most significant areas of impact while recommending methods that INSO could apply for systematically monitoring this impact. The overall objective is to suggest and outline a set of indicators that INSO could adopt to adequately demonstrate its ongoing impact on humanitarian programming and structure as well as the necessary mechanisms required for gathering and reporting on those indicators, namely what to measure, how, when and why. Key segments of this section could include:

- Is INSO's current approach effectively capturing the extent of its impact? What can and should INSO monitor and report on at both the structural and programming levels to best demonstrate its impact? Why are these the appropriate criteria or areas to focus on and how do they reflect the real impact of the organisation?
- What systems, processes or questions could be introduced to improve monitoring and evaluating these impacts? When, how, by whom and at what level should they be introduced? Should methods and indicators be context-specific or standardised across countries?
- What additional resources may these methods entail in terms of technical capacities or information systems and how should this focus be integrated within organisational strategy, structure and development?

Methodology

While the consultant is encouraged to propose specific and supplementary techniques in their application, the Strategic Review will consist of three key methodological components:

- A literature review of pre-existing INSO evaluations and reviews, humanitarian initiatives on NGO safety and access as well as supporting material provided by institutional donors on impact.
- Data collection through field research in at least five of INSO's programmes, particularly Afghanistan, Lake Chad Basin and Somalia as well as Mali or DRC and Iraq or Syria.
- Structured (INSO donors), semi-structured (INSO staff) and dialogic (INSO partners) interviews with target respondents in-country and via phone or online.

The consultant is free to identify and interview other key stakeholders who they think might contribute constructively to this Strategic Review, but the list of target respondents must include:

- Direct beneficiaries: NGO recipients of INSO's products and services, both in-country and in platforms not visited as part of the Strategic Review.
- Advisory Boards: NGO members who provide INSO with guidance on the quality, relevance and direction of products and services, both in-country and the International Advisory Board.
- INSO staff: Members of the Senior Management Team as well as those responsible for either overseeing or delivering products and services to NGO partners.
- Institutional donors: Representatives of INSO's main funders, both in-country and at HQ level, who are tasked with examining the impact of their NGO partners.
- NGO coordination fora: Other NGO organisations or platforms in-country and in Europe that are also tasked with measuring the impact of their contributions to the humanitarian community.
- Saving Lives Together: Members of the committee and focal points (UNOCHA and UNDSS).